

CBMS

Regional Tenders User Guide

Administrative User Guide

REGIONAL TENDERS USER GUIDE

Administrative User Guide

Rewind Consulting Inc

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Introduction

This guide details how a Regional Tender user can access and use the CBMS system. There are many functions that can be carried out by a Regional Tender user. They are laid out here in an easy-to-use, step-by-step fashion.

Regional Tender users will perform workflow surrounding MTO Regional contracts (creating, advertising, cancelling, awarding, etc), Contracts Office bid enquiries, Registration of Non-Qualified Contractors, and Tender Registration of Non-Qualified Contractors. Regional Tender users can also view a variety of other CBMS documents including MTO Capital contracts, Contract Attachments, Qualified Contractor Registrations, and Qualified Contractor Tender Registrations.

The first step to using the CBMS system effectively is learning how to access the Intranet interface and navigate the forms, views, and actions. This is explained in the Getting Started section of this document.

Once you have accessed the CBMS application and are ready to perform a task, refer to the table of contents and look for the name of the document. Underneath the document or report will be a list of actions that can be performed. Proceed to the correct page and follow the step-by-step instructions to complete your job. If you find that you have followed the step-by-step instructions and are having problems achieving the desired outcome, be sure to look over the “Conditions Required” Section at the top of Step 1. If you still find that you require assistance please feel free to contact the RAQS Help Desk.

Getting Started

The following Chapter will lead you through accessing and navigating the CBMS application as a Regional Tender user.

Logging In

Each Regional Tender user will receive a username and password to access the CBMS application. Once these have been obtained, the login screen for the application is accessed by opening Internet Explorer and entering the following URL in the address bar: <http://mtoln02/regionallogin>. This opens the Regional Intranet Login screen:

Enter a username and password (passwords are case-sensitive) and click the Login button (or press the Enter key) to login. If repeated login attempts are unsuccessful, the RAQS Help Desk should be contacted for further information.

After a successful login, the CBMS interface is opened:

C.B.M.S.
Contract Business Management System

RAQS Home | Contact Us | Logout
MTO Regional User
(John Smith)

Contracts | Contractors | Non-Qualified TRFs

Contract Bulletin

Lines per page: 300

Contract Number	Document Type	Region	District	Tender Opening Date
Information Posted In Last 7 Calendar Days				
Tenders Under Call				
Open Bids				
Awarded in Last 30 Days				
Tender Procedures				
MTO Info				

Navigating CBMS

The different parts of the interface are as follows:

Static Links and Information

The screenshot shows the C.B.M.S. interface with the following callouts:

- Clicking the RAQS Home link will log out the current user and redirect the browser to the RAQS public site home page.** (Points to the RAQS Home link in the top right navigation bar)
- Clicking the Contact Us link will display contact information for the RAQS Help Desk.** (Points to the Contact Us link in the top right navigation bar)
- The current user type is displayed along with the username of the current user.** (Points to the MTO Regional User (John Smith) text in the top right)
- Clicking the Logout link will logout the current user and redirect the browser to a page with links to login again or go to the RAQS public site home page.** (Points to the Logout link in the top right navigation bar)

Accessing Views

The screenshot shows the C.B.M.S. interface with the following callouts:

- Menu Headings** (Points to the Contracts, Contractors, and Non-Qualified TRFs headings in the top navigation pane)
- Drop-down menu** (Points to the drop-down menu that appears when hovering over the Contracts heading)
- All CBMS views are accessed through drop-down menus. Each heading along the top area of the page (the navigation pane) has a drop-down menu that appears as the mouse moves over the heading. The user can then click on a menu item to open the corresponding view. Available views are explained in greater detail in chapters 7, 8, and 9.** (Points to the list of views under the Contracts heading)

Action Buttons

C.B.M.S
Contract Business Management System

RAQS Home | Contact Us | Logout
MTO Regional User
(John Smith)

Contracts | Contractors | Non-Qualified TRFs

Contract Bulletin

Lines per page: 300

Contract Number

Information Posted

2000-1313

2003-1111

2003-1111

MTO Contract Eastern Ottawa District 41 Kingston

Tender Opening Date

13-May-2003 12:00:00 PM

09-May-2003 01:57:00 PM

01-May-2003 01:50:00 PM

Any actions that can be performed on the current document or view are displayed along the left of the screen (the action pane). An action is carried out by:

1. Moving the mouse over the desired action's text and/or icon
2. Clicking the mouse button.

New actions are loaded in each time a new document or view is opened.

Viewing Documents and Views

C.B.M.S
Contract Business Management System

Contracts | Contractors | Non-Qualified TRFs

Contract Bulletin

Lines per page: 300

Contract Number

Document Type

Region

District

Tender Opening Date

Information Posted In Last 7 Calendar Days

Tenders Under Call

Open Bids

Awarded in Last 30 Days

Tender Procedures

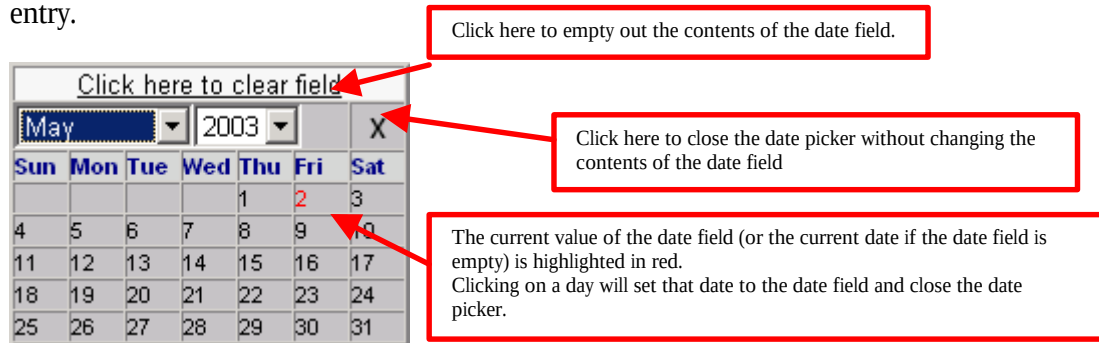
MTO Info

All documents and views are opened in the large open portion of the screen on the lower right (the working pane). The navigation and action panes always remain open while the content of the working pane changes.

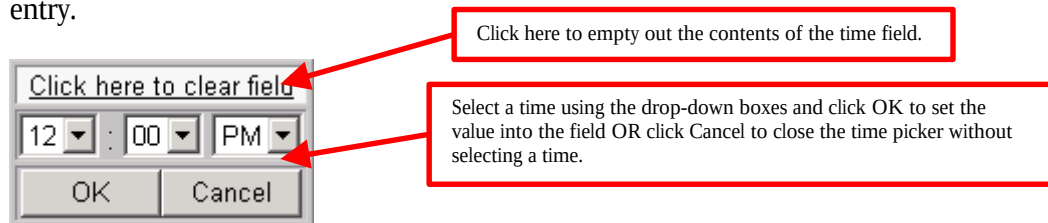
When accessing CBMS for the first time, the user should try navigating the different links and menu items to get a feel for how the interface works.

Extra Information – Date Picker

For all editable date fields in the CBMS application, after the cursor is placed into the field (via the mouse or Tab key) a Date Picker appears over top of the field to facilitate easy data entry.

*Extra Information – Time Picker*

For all editable time fields in the CBMS application, after the cursor is placed into the field (via the mouse or Tab key) a Time Picker appears over top of the field to facilitate easy data entry.

*Extra Information – Auto-Formatting*

Certain editable fields in the CBMS application, such as telephone numbers or postal codes, require their text to be in a specific format. In these cases, CBMS assists the user with data entry by automatically formatting text as it is typed in. For example, as the number 9045550000 is typed into a phone number field, it is automatically formatted to look like (904) 555-0000.

*Extra Information – Using Views***1. Opening Documents**

To open a document from a view, move the mouse over the document until the row becomes highlighted:

Contract Number	Document Type	Region	District	Tender Opening Date
▼ Information Posted In Last 7 Calendar Days				
2000-1313	MTO Contract	Central	Not Applicable	13-May-2003 12:00:00 PM
2003-1111	MTO Contract	Eastern	District 41 Kingston	01-May-2003 01:50:00 PM
2003-1111	Extension Of Time	Eastern	District 41 Kingston District 42 Ottawa	02-May-2003 01:57:00 PM

Use a single click of the mouse to open the document.

2. Using Categories

When any categorized view is open, the Expand All and Collapse All actions will be available in the action pane:



Expand All opens all categories and subcategories within the view.

Collapse All closes all categories and subcategories within the view.

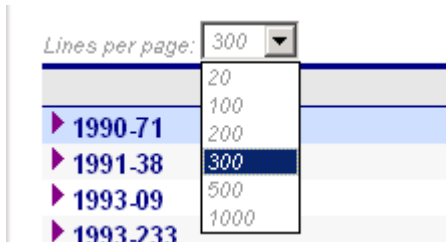
To open or close a single category, move the mouse over the category row until the row is highlighted:

▼ 1990-71
▶ Contract Tender Form
▶ Contract Attachments
▶ Tender Registration Forms
▶ 1991-38
▶ 1993-09
▶ 1993-233
▶ 1993-97
▶ 1998-20
▶ 2000-0012
▶ 2000-1313

Use a single click of the mouse to toggle the category between open and closed.

3. Using Lines per page

The “Lines per page” drop-down at the top of every view determines how many rows of the current view should be shown at once (default is 300).



This can be very useful when navigating views with a large number of documents. Selecting a new value for Lines per page refreshes the view. If there is more than one page in the view (example: 600 total lines in a view with 300 Lines per page selected equals 2 pages, 1-300 and 301-600), a page navigator will appear next to the “Lines per page” drop down:



Clicking on a page number opens that page (example: clicking on 2 starts the view at the twenty-first row).

The page number that is not clickable indicates the current page.

Clicking on “next>>” opens the next page (if available).

Clicking on “<<prev” opens the previous page (if available).

4. Using the Find action

The Find action is available for all views. It searches the first non-categorized column in the view for the text that you specify and highlights the document that is the closest match (if no match is found, no document is highlighted). It is important to note that only the rows on the current page of the view are searched. To search more pages at once, select a higher number of Lines per page.

Contract Tender Form

The following Chapter describes the Contract Tender Form and all associated actions that can be performed.

The Contract Tender Form(CTF) is an integral part of the CBMS System. Regional Tender users can create, activate, edit and inactivate (in effect cancel) MTO Regional contracts from their own region using the Contract Tender Form. They can also award a contract and remove the award of a contract. CTF's can be accessed in a number of different views.

I C O N K E Y	
	Draft Contract Tender Form
	Active Contract Tender Form
	Inactivated Contract Tender Form

For the purpose of describing the above actions we will be using the “Contracts By Number” view. This is accessed through the Contracts – View By Contract Number menu item.

Creating a Contract Tender Form

Conditions Required

1. All required fields must be correctly completed (required fields are indicated with red checkmarks) before a new contract can be saved.

Step One:

C.B.M.S. Contract Business Management System

RAQS Home | Contact Us | Logout
MTO Regional User (John Smith)

Contracts | Contractors | Non-Qualified TRFs

Expand All
Collapse All
Create NQTRF
Create CTF
Find

Contracts By Number

Lines per page: 300

1990-71
1991-38
1993-09
1993-233
1993-97
1998-20

Navigate to the Contracts By Number view and click the Create CTF action.

Step Two:

C.B.M.S. Contract Business Management System

RAQS Home | Contact Us | Logout
MTO Regional User (John Smith)

Non-Qualified TRFs

Contract Tender Form

Status: Draft

Cancel
Save & Exit
Activate

Note: the Cancel action can be used at anytime to close this document without saving.

A new Contract Tender Form opens. There are five main sections on a CTF but the only one that applies to new documents is the Pre-Award section. Click anywhere on the section heading to open the section.

Pre-Award Section
Plan Takers Section
Bid Information Section
Award Section
Post-Award Section

Step Three – Contract Details Subsection:

Date Created: This field automatically computes to the current date.

Program Year: This field indicates the program year of the contract.

Contract Number: The contract number is the main field used to identify contracts within CBMS. The contract number entered must be unique among all CBMS contracts where Tender Owner is MTO Regional. This field is required.

SSB Number: This field can indicate the Shared Services Bureau Number of the contract. This field is optional.

Region: This field automatically computes to the current Regional Tender User's region.

Tender Owner: This field automatically computes to MTO Regional to indicate that the contract is to be tendered for a regional office.

District: The District field indicates which district or districts (within a region) that the contract applies to. The choices for this field are determined by the value of the Region field. This field is required.

Length: This field can indicate the length of the contract (ex: 10km). This field is optional.

Contract Location: The Location field contains a brief description of where the contract will be taking place. This field is required.

Highway: This field can indicate which highway the contract applies to. This field is optional.

Project Manager: This field can indicate the name of the project manager. This field is optional.

Core Plan Required: This field indicates if a Core Plan is required for this contract. Note that both the Core Plan Required and the Bonding Available For Non-Qualified Contractors fields cannot be set to "Yes" at the same time.

Group W.P. Number: This field can indicate the Group Work Project Number of the contract. This field is optional.

Contract Details

Date Created:	2-May-2003	Program Year:	2002-03
Contract Number:		SSB Number:	
Region:	Central	Tender Owner:	MTO Regional
District:	Burlington Area Office Not Applicable	Length:	
Contract Location:			
Highway:		Project Manager:	
Core Plan Required:	☐ Yes ☒ No		Group W.P. Number:

Enter a contract number, choose one or more districts (hold the Shift or Ctrl key for multiple selections), and enter the contract description. These fields are required.

If desired, enter values for the other fields in the Contract Details subsection. These fields are optional.

Step Four – Contract Description Subsection:

Contract Description: This field should contain a description of the work to be done. This field is required.

Contract Description ✓

Enter a description of the work to be done for this contract. This field is required (maximum 200 characters).

Step Five – Dates Subsection:

Tender Advise Date: This field indicates the date on which the contract should become readable by external RAQS/CBMS users. Once the Tender Advise Date has passed and the contract is Active, the general public will be able to view the contract through the RAQS public site and contractors will be able to view the contract through the secure CBMS site. This field is not required until activation.

Current Tender Opening: This consists of two fields: Tender Open Date and Tender Open Time. These fields indicate the date and time that this contract's bids are scheduled to be opened. Contractors cannot create TRF or NQTRF documents for this contract after this date and time have passed. This field is not required until activation.

Date Contract Received in Contracts Section: This is the date that the contract was received in the contracts section. This field is optional.

Original Tender Opening: This field automatically computes to the first Tender Opening Date ever entered for this contract. This is stored for audit purposed in case the Tender Open Date is changed later on.

TRF Submission Opening: This field automatically computes to 28 days prior to the Tender Open Date. This field is not refreshed until the document is saved.

TRF Submission Close: This field automatically computes to the last Friday prior to the Tender Open Date. This field is not refreshed until the document is saved.

Dates

Tender Advise Date:		Current Tender Opening:		at	
Date Contract Received In Contracts Section:		Original Tender Opening:			
TRF Submission Opening:		TRF Submission Close:			

Enter the Tender Advise Date and Current Tender Opening Date and Time if so desired (these fields are optional until the contract is Activated).
Enter the Date Contract Received in Contracts Section if so desired.

Step Six – Primary Contact Details Subsection:

First Name: This field contains the first name of the contact person for this contract. This field is required.

Last Name: This field contains the last name of the contact person for this contract. This field is required.

Phone: This field contains the phone number of the contact person for this contract. This field is required and must be a valid nine-digit phone number.

Extension: This field can contain the phone extension of the contact person for this contract. This field is optional.

Email Address: This field can contain the email address of the contact person for this contract. This field is optional. If entered, the value for this field must be a valid email address.

Fax: This field can contain the fax number of the contact person for this contract. This field is optional. If entered, the value for this field must be a valid nine-digit phone number.

Primary Contact Details

First Name: ✓		Phone: ✓	
Last Name: ✓		Extension:	
Email Address:		Fax:	

Enter the primary contact person's first name, last name, and phone number. These fields are required.
If desired, enter the primary contact person's email, extension, and fax number. These fields are optional.

Step Seven - Instructions:

Special Instructions: This field can contain any special instructions for the contract that possible bidders should know. This field is optional.

Bid Enquiry Instructions: This field is required and should contain a brief description of how contractors can perform bid enquiries about this contract.

Order Instructions: This field is required and should contain a brief description of how contractors can order Tender Documents related to this contract.

If desired, enter any special instructions for this contract. This field is optional.

Special Instructions

Bid Enquiry Instructions ✓

Order Instructions ✓

Enter the bid enquiry and order instructions for this contract. These fields are required.

Step Eight – Classifications of Work:

Classification of Work: The Classification of Work fields indicate which types of work the contract will require. Up to five types can be selected. The same type cannot be selected twice. At least one type must be selected.

Financial Ratings: For each Classification of Work selected, either a (Financial) Required Rating or a (Financial) Minimum Rating (or both) must be specified.

Financial Rating - Required Rating: A (Financial) Required Rating amount can be entered for each Classification of Work selected. Qualified Contractors wishing to bid on this contract must meet at least one of the (Financial) Required Rating amounts.

Financial Rating - Minimum Rating: A (Financial) Minimum Rating amount can be entered for each Classification of Work selected. Qualified Contractors wishing to bid on this contract must meet ALL the (Financial) Minimum Rating amounts.

Maximum Workload Rating - Required Rating: For each (Financial) Required Rating amount entered, a corresponding (Maximum Workload) Required Rating amount must be entered and must be equal to or higher than the Financial amount. Qualified Contractors (with Maximum Workload Ratings imposed) wishing to bid on this contract must meet at least one of the (Maximum Workload) Required Rating amounts.

Maximum Workload Rating - Minimum Rating: For each (Financial) Minimum Rating amount entered, a corresponding (Maximum Workload) Minimum Rating amount must be entered and must be equal to or higher than the Financial amount. Qualified Contractors (with Maximum Workload Ratings imposed) wishing to bid on this contract must meet ALL the (Maximum Workload) Minimum Rating amounts.

Classification of Work ✓ (at least one)	Financial Rating		Maximum Workload Rating	
	Required Rating (\$) (must satisfy one)	Minimum Rating (must satisfy all)	Required Rating (\$) (must satisfy one)	Minimum Rating (must satisfy all)
EL-Electrical	\$10,000	\$10,000	\$12,000	\$12,000
GM-General Maintenance	\$100,000	\$0	\$100,000	\$0
GR-General Road	\$0	\$30,000	\$0	\$35,000
	\$0	\$0	\$0	\$0
	\$0	\$0	\$0	\$0

1. Select one or more classifications of work. You must select at least one.

2. For each classification of work selected, enter a Financial Rating Required Rating and/or a Financial Rating Minimum Rating.

3. For each Financial Rating Required Rating amount that is entered, enter a Maximum Workload Rating Required Rating amount that is equal or greater.

4. For each Financial Rating Minimum Rating amount that is entered, enter a Maximum Workload Rating Minimum Rating amount that is equal or greater.

Step Nine – Contract Documents:

Should Tenders Charge For Plans: This field indicates whether or not there should be a charge for tender documents related to this contract.

Date Plans Sent to Print: This field indicates the date that the plan book for this contract was sent to the printers.

Date Tender Sent to Print: This field indicates the date that the tender book for this contract was sent to the printers.

Contract Documents	
Should Tenders Charge for Plans?	☒ Yes ☐ No
Date Plans Sent to Print:	
Date Tender Sent to Print:	

If desired, enter values for these fields (these fields are optional).

Step Ten – Bonding Fields:

Bonding Available for Non-Qualified Contractors: This field indicates whether or not Non-Qualified Contractors can use bonding to bid on this contract. Note that both the Core Plan Required and the Bonding Available for Non-Qualified Contractors fields cannot be set to “Yes” at the same time.

Performance Bond: If the Bonding Available for Non-Qualified Contractor's field is set to Yes, this field appears. This indicates the percentage or dollar amount that the MTO retains if the contractor does not perform work on the contract. If the Bonding Available for Non-Qualified Contractors field is set to No, this field is not visible.

Payment Bond: If the Bonding Available for Non-Qualified Contractors field is set to Yes, this field appears. This indicates the percentage or dollar amount that the MTO retains if the contractor does not pay its subcontractors. If the Bonding Available for Non-Qualified Contractors field is set to No, this field is not visible.

Bonding Requirements			
Bonding Available for Non-Qualified Contractors:		☒ Yes ☐ No	
Performance Bond:	50% (Percentage)	Payment Bond:	50% (Percentage)
	OR		OR
	\$50,000 (Dollars)		\$50,000 (Dollars)

Select Yes or No for the Bonding Available for Non-Qualified Contractors (the field defaults to Yes).

If Yes is selected, enter the Performance Bond and/or the Payment Bond fields.

Step Eleven - Notes:

Capital Contract Notes: This field contains optional text describing the capital contract.

Capital Contract Notes
Enter any extra notes here. This field is optional.

Step Twelve:

Required Field Recap - The following fields must be filled in before a new contract can be saved:

Contract Number (must be unique among all other MTO Regional contracts)

District

Contract Location

Contract Description

Primary Contact First Name

Primary Contact Last Name

Primary Contact Phone (must be a 9 digit number in the format (###)###-####)

Bid Enquiry Instructions

Order Instructions

Classification of Work (you must select at least one)

C.B.M.S

Contract Business Management System

Contracts | Contractors | Non-Qualified TRFs

✖ Cancel

💾 Save & Exit

✅ Activate

Contract Tender Form

Status: Draft

Once all fields have been completed as desired, click the Save & Exit action to finish.

Status Last Updated By: j

► Pre-Award Section

Result:**C.B.M.S**

Contract Business Management System

RAQS Hc

Contracts | Contractors | Non-Qualified TRFs

Contracts By Number

Lines per page: 300

▶ 1990-71
▶ 1991-38
▶ 1993-09
▶ 1993-233
▶ 1993-97
▶ 1998-20
▶ 2000-0012
▶ 2000-1313
▶ 2001-8900
▶ 2003-0002
▼ 2003-0500

▼ Contract Tender Form

Contract: 2003-0500 Tender Opening: 29-May-2003 at 12:00:00 PM

The document is saved and the Contracts By Number view is re-opened. The newly created contract is shown in the view with the draft icon.

Editing a Contract Tender Form

Conditions Required

1. The Status of the contract must be “Draft” or “Active”.
2. The Region of the contract must be the same region as the current Regional Tender user.
3. The Tender Owner of the contract must be MTO Regional.
4. All required fields must be correctly completed before saving the document.

Step One:

C.B.M.S

Contract Business Management System

Contracts | Contractors | Non-Qualified TRFs

Contracts By Number

Lines per page: 300

▶ 1990-71
▶ 1991-38
▶ 1993-09
▶ 1993-233
▶ 1993-97
▶ 1998-20
▶ 2000-0012
▶ 2000-1313
▶ 2001-8900
▶ 2003-0002
▼ 2003-0500

▼ Contract Tender Form

Contract: 2003-0500 Tender Opening: 29-May-2003 at 12:00:00 PM

Navigate to the Contracts By Number, highlight the desired contract, and click to open it.

Step Two:

C.B.M.S

Contract Business Management System

Contracts | Contractors | Non-Qualified TRFs

Contract Tender Form

Status: Draft

Status Last Up

Close
Edit
Activate
Delete

With the document open in read mode, click the Edit action to place it in edit mode.

Note: the Close action is available in read mode to close the document and return to the last view.

▶ Pre-Award Section

Plan Takers Section

▶ Bid Information Section

Step Three – Contract Details Subsection:

Contract Details			
Date Created:	5-May-2003	Program Year:	2002-03 ▾
Contract Number:	✓ 2003-0500	SSB Number:	
Region:	Central	Tender Owner:	MTO Regional
District:	✓ Burlington Area Office Not Applicable	Length:	
Contract Location:	✓ QEW		
Highway:	QEW	Project Manager:	Jason Thomas
Core Plan Required:	☐ Yes ☒ No	Group W.P. Number:	

Date Created: This field indicates the date that the document was created. This field is not editable.

Program Year: This field indicates the program year of the contract. This field is always editable and always required.

Contract Number: The contract number is the main field used to identify contracts within CBMS and is unique among all contracts where Tender Owner is MTO Regional. This field is only editable while creating a new contract. On existing contracts, this field is not editable.

SSB Number: This field can indicate the Shared Services Bureau Number of the contract. This field is always editable and always optional.

Region: This field indicates the Region of Ontario that the contract takes place in. This field is not editable.

Tender Owner: This field indicates that the contract is to be tendered for a regional office. This field is not editable.

District: This field indicates which district or districts (within a region) that the contract applies to. The choices for this field are determined by the value of the Region field. This field is always required and always editable.

Length: This field can indicate the length of the contract (ex: 10km). This field is always editable and always optional.

Contract Location: This field contains a brief description of where the contract will be taking place. This field is always required and always editable.

Highway: This field can indicate which highway the contract applies to. This field is always editable and always optional.

Project Manager: This field can indicate the name of the project manager. This field is always editable and always optional.

Core Plan Required: This field indicates if a Core Plan is required for this contract. This field cannot be set to Yes unless the Bonding Available for Non-Qualified Contractors field is set to No. This field is always editable and always required.

Group W.P. Number: This field can indicate the Group Work Project Number of the contract. This field is always editable and always optional.

Step Four – Contract Description:

Contract Description ✓
Grading and Paving

Contract Description: This field should contain a description of the work to be done. This field is always required and always editable.

Step Five – Pre-Award Section Dates Subsection:

Dates			
Tender Advertise Date:	05/05/2003	Current Tender Opening:	05/29/2003 at 12:00 PM
Date Contract Received In		Original Tender Opening:	29-May-2003
Contracts Section:			
TRF Submission Opening:	05/01/2003	TRF Submission Close:	05/23/2003

Tender Advertise Date: This field indicates the date on which the contract should become readable by external RAQS/CBMS users. Once the Tender Advertise Date has passed and the contract is Active, the general public will be able to view the contract through the RAQS public site and contractors will be able to view the contract through the secure CBMS site. If the contract has a status of "Active", this field is required. This field is always editable.

Current Tender Opening: This consists of two fields: Tender Open Date and Tender Open Time. These fields indicate the date and time that this contract's bids are scheduled to be opened. Contractors cannot create TRF or NQTRF documents for this contract after this date and time have passed. If the contract has a status of "Active", these fields are required. Tender Open Date must be greater than Tender Advertise Date. If Tender Open Date is entered, Tender Open Time must also be entered. These fields are only editable up until the Tender Open Date has occurred.

Date Contract Received in Contracts Section: This is the date that the contract was received in the contracts section. This field is always editable and always optional.

Original Tender Opening: This indicates the first Tender Opening Date ever entered for this contract. This field is not editable.

TRF Submission Opening: This field automatically computes to 28 days prior to the Tender Open Date. This field is not editable.

TRF Submission Close: This field automatically computes to the last Friday prior to the Tender Open Date. This field is not editable.

Step Six – Primary Contact Subsection:

Primary Contact Details			
First Name: ✓	Jason	Phone: ✓	(909) 090-9099
Last Name: ✓	Thomas	Extension:	
Email Address:		Fax:	

First Name: This field contains the first name of the contact person for this contract. This field is always editable and always required.

Last Name: This field contains the last name of the contact person for this contract. This field is always editable and always required.

Phone: This field contains the phone number of the contact person for this contract. This field is always editable and always required. This field must have a 9-digit value in the format (###) ###-####.

Extension: This field can contain the phone extension of the contact person for this contract. This field is always editable and always optional.

Email Address: This field can contain the email address of the contact person for this contract. This field is always editable and always optional. If a value is entered, however, it must be a valid email.

Fax: This field can contain the fax number of the contact person for this contract. This field is always editable and always optional. If a value is entered, however, it must be 9 digits in the format (###) ###-####.

Step Seven – Instructions:

Special Instructions

Bid Enquiry Instructions ✓

Order Instructions ✓

Special Instructions: This field can contain any special instructions for the contract that possible bidders should know. This field is always editable and always optional.

Bid Enquiry Instructions: This field is required and should contain a brief description of how contractors can perform bid enquiries about this contract. This field is always editable and always required.

Order Instructions: This field is required and should contain a brief description of how contractors can order Tender Documents related to this contract. This field is always editable and always required.

Step Eight – Classifications:

Classification of Work ✓ (at least one)	Financial Rating		Maximum Workload Rating	
	Required Rating (\$) (must satisfy one)	Minimum Rating (must satisfy all)	Required Rating (\$) (must satisfy one)	Minimum Rating (must satisfy all)
EL-Electrical	\$50,000	\$0	\$55,000	\$0
	\$0	\$0	\$0	\$0
	\$0	\$0	\$0	\$0
	\$0	\$0	\$0	\$0
	\$0	\$0	\$0	\$0

Classification of Work: The Classification of Work fields indicate which types of work the contract will require. Up to five types can be selected. The same type cannot be selected twice. At least one classification of work must be selected for any contract. These fields are always editable.

Financial Ratings: For each Classification of Work selected, either a (Financial) Required Rating or a (Financial) Minimum Rating (or both) is required.

Financial Rating - Required Rating: A (Financial) Required Rating amount can be entered for each Classification of Work selected. Qualified Contractors wishing to bid on this contract must meet at least one of the (Financial) Required Rating amounts. This field is only editable if the corresponding Classification of Work is not blank.

Financial Rating - Minimum Rating: A (Financial) Minimum Rating amount can be entered for each Classification of Work selected. Qualified Contractors wishing to bid on this contract must meet ALL the (Financial) Minimum Rating amounts. This field is only editable if the corresponding Classification of Work is not blank.

Maximum Workload Rating - Required Rating: For each (Financial) Required Rating amount entered, a corresponding (Maximum Workload) Required Rating amount must be entered and must be equal to or higher than the Financial amount. Qualified Contractors (with Maximum Workload Ratings imposed) wishing to bid on this contract must meet at least one of the (Maximum Workload) Required Rating amounts. This field is only editable if the corresponding Classification of Work is not blank.

Maximum Workload Rating - Minimum Rating: For each (Financial) Minimum Rating amount entered, a corresponding (Maximum Workload) Minimum Rating amount must be entered and must be equal to or higher than the Financial amount. Qualified Contractors (with Maximum Workload Ratings imposed) wishing to bid on this contract must meet ALL the (Maximum Workload) Minimum Rating amounts. This field is only editable if the corresponding Classification of Work is not blank.

Step Nine – Contract Documents Subsection:

Contract Documents

Should Tenders Charge for Plans?

☒ Yes ☐ No

Date Plans Sent to Print:

Date Tender Sent to Print:

Should Tenders Charge For Plans: This field indicates whether or not there should be a charge for tender documents related to this contract. This field is always editable and always required.

Date Plans Sent to Print: This field indicates the date that the plan book for this contract was sent to the printers. This field is always editable and always optional.

Date Tender Sent to Print: This field indicates the date that the tender book for this contract was sent to the printers. This field is always editable and always optional.

Step Ten – Bonding Subsection:

Bonding Requirements

Bonding Available for Non-Qualified Contractors:

☒ Yes ☐ No

Performance Bond: (Percentage)

Payment Bond: (Percentage)

OR

OR

(Dollars)

(Dollars)

Bonding Available for Non-Qualified Contractors: This field indicates whether or not Non-Qualified Contractors can use bonding to bid on this contract. Note that both the Core Plan Required and the Bonding Available for Non-Qualified Contractors fields cannot be set to "Yes" at the same time. This field is always editable and always required.

Performance Bond: If the Bonding Available for Non-Qualified Contractor's field is set to Yes, this field appears. This indicates the percentage or dollar amount that the MTO retains if the contractor does not perform work on the contract. If the Bonding Available for Non-Qualified Contractors field is set to No, this field is not visible.

Payment Bond: If the Bonding Available for Non-Qualified Contractors field is set to Yes, this field appears. This indicates the percentage or dollar amount that the MTO retains if the contractor does not pay its subcontractors. If the Bonding Available for Non-Qualified Contractors field is set to No, this field is not visible.

Step Eleven – Notes:

Capital Contract Notes

Capital Contract Notes: This field can contain text describing the contract. This field is always editable and always optional.

Step Twelve – Plan Takers Section:

▼ Plan Takers Section

Company Name

Street Address

No Plan Takers Found For This Contract

When viewing MTO Capital contracts, this section can contain a list of company names and street addresses for all companies that have ordered documents online for this contract. Because online ordering is currently unavailable for MTO Regional contracts, this section always reads "No Plan Takers Found For This Contract".

Step Thirteen – Bid Information Section:

▼ Bid Information Section

Company	Total Adjusted Tender	Total Tender
50-10000-00 (Joint) [Wendys]	\$0.00	\$0.00
70-10001-00 (Simple) [The Keg]	\$0.00	\$0.00
Bidding Complete: ☐ Yes ☒ No		

If there are no approved TRF or NQTRF documents for this contract, this section contains the text “There are currently no TRFs for this contract”. If there are one or more approved TRF or NQTRF documents for this contract, this section has the following fields:

Company: This is a list of all companies with approved TRF or NQTRF documents for this contract. The list contains each company's name, assigned ID, and TRF Bid Type. This field is not editable.

Total Adjusted Tender: This is a list of the Total Adjusted Tender for all companies with approved TRF or NQTRF documents for this contract. This list corresponds horizontally to the Company list. This field is only editable indirectly through the Update Tender Totals action.

Total Tender: This is a list of the Total Tenders for all companies with approved TRF or NQTRF documents for this contract. This list corresponds horizontally to the Company list. This field is only editable indirectly through the Update Tender Totals action.

Bidding Complete: This field indicates whether or not all bids have been received for this contract. This field must be set to yes before a contract can be awarded. When visible, this field is always editable and always required.

Step Fourteen – Lowest Bidder Subsection:

▼ Award Section

Lowest Bidder		
Firm	Total Adjusted Tender	Total Tender
	\$0.00	\$0.00

If there are no approved TRF or NQTRF documents for this contract OR this contract has been Inactivated, this subsection is not visible. Otherwise, this subsection has the following fields:

Firm: This is the name, assigned ID, and TRF Bid Type of the company (from the Bid Information Section) that has the lowest Total Adjusted Tender. This field is automatically computed each time the Update Tender Totals action is performed. This field is not editable.

Total Adjusted Tender: This is the Total Adjusted Tender of the company (from the Bid Information Section) that has the lowest Total Adjusted Tender. This field is automatically computed each time the Update Tender Totals action is performed. This field is not editable.

Total Tender: This is the Total Tender of the company (from the Bid Information Section) that has the lowest Total Adjusted Tender. This field is automatically computed each time the Update Tender Totals action is performed. This field is not editable.

Step Fifteen – Awarded To Subsection:

Awarded To		Total Adjusted Tender	Total Tender
Firm			
70-10001-00 (Simple) [The Keg]		\$70,000.00	\$60,000.00
Tender Deposit Type:	☒ Bid Bond ☐ Certified Cheque ☐ Irrevocable Letter of Credit		
Tender Deposit Received:	☐ Yes ☒ No	Payment or Performance Bond Received: ☐ Yes ☒ No	

If there are no approved TRF or NQTRF documents for this contract OR this contract has been Inactivated, this subsection is not visible. Otherwise, this subsection has the following fields:

Firm: This is the name, assigned ID, and TRF Bid Type of the company (from the Bid Information Section) that this contract has been awarded to. This field is automatically computed after the Award Contract action is performed. This field is not editable.

Total Adjusted Tender: This is the Total Adjusted Tender of the company (from the Bid Information Section) that this contract has been awarded to. This field is automatically computed after the Award Contract action is performed. This field is not editable.

Total Tender: This is the Total Tender of the company (from the Bid Information Section) that this contract has been awarded to. This field is automatically computed after the Award Contract action is performed. This field is not editable.

Tender Deposit Type: This field is only visible if the contract has been awarded to a Non-Qualified Contractor. This field indicates the type of tender deposit that the winning contractor must supply. When visible, this field is always editable and always required.

Tender Deposit Received: This field is only visible if the contract has been awarded to a Non-Qualified Contractor. This field indicates whether or not the tender deposit has been received from the winning contractor. When visible, this field is always editable and always required. This field must be set to Yes before a contract can be saved as being awarded to a Non-Qualified Contractor.

Payment or Performance Bond Received: This field is only visible if the contract has been awarded to a Non-Qualified Contractor. This field indicates whether or not a payment or performance bond has been received from the winning contractor. When visible, this field is always editable and always required. This field must be set to Yes before a contract can be saved as being awarded to a Non-Qualified Contractor.

Step Sixteen – Joint Bid Details Subsection:

Joint Bid Details	
Company Name (Lead Company: 50-10000-00)	Percentage %
50-10000-00 [Wendys]	60%
50-10020-00 [Burger King]	40%

If there are no approved TRF or NQTRF documents for this contract OR this contract has been Inactivated OR this contract has not been awarded to a joint bid and saved, this subsection is not visible. Otherwise, this subsection has the following fields:

Lead Company: This is the lead company's assigned ID. This field is computed after a contract is awarded to a joint bid and saved. This field is not editable.

Company Name: This is a list of each joint bidder's name and assigned ID. This field is computed after a contract is awarded to a joint bid and saved. This field is not editable.

Percentage: This is the list of each joint bidder's percentage of the total bid. This list corresponds horizontally to the Company Name list. This field is computed after a contract is awarded to a joint bid and saved. This field is not editable.

Step Seventeen – Award Section Dates Subsection:

If this contract has been Inactivated , this subsection is not visible. Otherwise, this subsection has the following fields:

Dates	
Award Date:	05/31/2003
Date contractor is to return contract:	
Actual date contract is returned:	
Date faxed to regions giving approval:	
Minister signature date:	
Contract Start Date:	
Rush Award:	
Fixed Completion Date:	

Award Date: This field is the date that the contract was awarded. This field is always editable. This field is required if the contract has been awarded.

Date contractor is to return contract: This is the date that the contractor is required to return the contract to the MTO. This field is always editable and always optional.

Actual date contract is returned: This is the date that the contractor actually returned the contract to the MTO. This field is always editable and always optional.

Date faxed to regions giving approval: The date the contract is faxed to the regions. This field is always editable and always optional.

Minister signature date: This the date that the minister signed off the awarding of the contract. This field is always editable and always optional.

Contract start date: This is the date that work will start on the contract. This field is always editable and always optional.

Rush Award: This is the Rush Award Date. This field is always editable and always optional.

Fixed Completion Date: This is the date on which the contractor must have completed all tendered bid work. This field is always editable and always optional.

Step Eighteen – Schedule Subsection:

If this contract has been Inactivated , this subsection is not visible. Otherwise, this subsection has the following fields:

Schedule	
Work Schedule:	☒ Not required ☐ Sent ☐ Returned
Critical Path Schedule:	☐ Yes ☒ No ☐ Recieved
Materials Schedule:	☒ Not required ☐ Sent ☐ Returned
Statement of Imported Content:	☒ Not required ☐ Sent ☐ Returned
Appointment of Agent:	☒ Not required ☐ Sent ☐ Returned
Quality Control Plan Appendix Required:	☒ Not Required ☐ Required
Number of bid days in A + B bidding:	0.00 Working days
Number of Working days:	

Work Schedule: This field indicates if the work schedule was sent, returned, or not required. This field is always editable and always optional.

Critical Path Schedule: This indicates if the critical path schedule has been received from the contractor. This field is always editable and always optional.

Materials Schedule: This indicates if the materials schedule was sent, returned, or not required. This field is always editable and always optional.

Statement of Imported Content: This indicates if the statement of imported content was sent, returned, or not required. This field is always editable and always optional.

Appointment of Agent: This indicates if the appointment of agent was sent, returned, or not required. This field is always editable and always optional.

Quality Control Plan Appendix Required: This indicates whether or not a quality control plan appendix is required. This field is always editable and always optional.

Number of Days in A + B Bidding: This field is always editable and always optional.

Number of Working Days: The number of days (excepting Saturdays, Sundays, and Holidays) that the contract will require. This field is always editable and always optional.

Step Nineteen – Insurance Subsection:

If this contract has been Inactivated , this subsection is not visible. Otherwise, this subsection has the following fields:

Insurance	
Special Insurance Coverage:	
Insurance Company:	
Policy Numbers:	
Request were sent on:	
Insurance Expiry:	

Special Insurance Coverage: This is the contractor's special insurance coverage. This field is always editable and always optional.

Insurance Company: This is the name of the contractor's insurance company. This field is always editable and always optional.

Policy Numbers: This is the contractor's insurance policy numbers. This field is always editable and always optional.

Request were sent on: This is the date that the insurance request was sent to the contractor. This field is always editable and always optional.

Insurance Expiry: This is the date the insurance is effective until. This field is always editable and always optional.

Step Twenty – Award Comments:

If this contract has been Inactivated, this subsection is not visible. Otherwise, this subsection has the following field:

Award Comments

Award Comments: This can contain any comments related to the awarding of the contract. This field is always editable and always optional.

Step Twenty-One – Post Award Section:

If this contract has been Inactivated, this subsection is not visible. Otherwise, this subsection has the following fields:

▼ Post-Award Section

Post Award Dates

Date of Substantial Performance Published:

Date of Certification of Completion:

Date of Final Contract Acceptance:

Post Award Comments

Date of Substantial Performance Published: This is the date on which a contract is, for all intents and purposes, complete. This field is always editable and always optional.

Date of Certification: This is the date on which a contract is 100%. This field is always editable and always optional.

Date of Final Contract Acceptance: This is the date when the warranty period of a contract expires. This field is always editable and always optional.

Post-Award Comments: This can contain any comments related to the contract after it is awarded. This field is always editable and always optional.

Step Twenty-Two:

C.B.M.S

Contract Business Management System

Contracts | Contractors | Non-Qualified TRFs

✖ Cancel

🖱 Save & Exit

✖ Inactivate

📝 Update Bids

🖱 Award Contract

Contract Tender Form

Status: Awarded

Contract Updated By: John

When the desired changes have been made, click Save & Exit to finish editing.

► Pre-Award

► Plan Takers Section

Result:**C.B.M.S**

Contract Business Management System

[Contracts](#) | [Contractors](#) | [Non-Qualified TRFs](#)

-  Expand All
-  Collapse All
-  Create HQTRF
-  Create CTF
-  Find

Contracts By Number

Lines per page: 300

- ▶ 1990-71
- ▶ 1991-38
- ▶ 1993-09
- ▶ 1993-233

Changes have been saved and the Contracts By Number view is re-opened.

Activating a Contract Tender Form

Activating a contract sets the status of the contract to Active. This means that once the Tender Advertise Date has passed, external users will be able to view the contract through the RAQS public site and the CBMS secure site. Once a contract is Active, it cannot be set back to Draft. Instead, it can only be Inactivated. Activation can be done while creating a new contract, or while reading or editing an existing contract.

Conditions Required

1. The Tender Open Date, Tender Open Time, and Tender Advertise Date fields must be filled in.
2. The Tender Owner must be MTO Regional.
3. The Tender Open Date must be greater than the current date.
4. The Status of the contract must be Draft.
5. The contract must be from the same region as the current Regional Tender User.

Step One:

C.B.M.S

Contract Business Management System

RAQS

Contracts | Contractors | Non-Qualified TRFs

Contracts By Number

Lines per page: 300

▶ 1990-71
 ▶ 1991-38
 ▶ 1993-09
 ▶ 1993-233
 ▶ 1993-97
 ▶ 1998-20
 ▶ 2000-0012
 ▶ 2000-1313
 ▶ 2001-8900
 ▶ 2003-0002
 ▶ 2003-0500
 ▼ 2003-0501

▼ Contract Tender Form

✎ Contract: 2003-0501 Tender Opening: 29-May-2003 at 12:00:00 PM

Navigate to the Contracts By Number view, locate the desired contract, and click to open it.

Step Two:**C.B.M.S**

Contract Business Management System

Contracts | Contractors | Non-Qualified TRFs

Close

Edit

Activate

Delete

Contract Tender Form

Status: Draft

Status Last Updated By: John Sn

Pre-Award

Plan Takers Section

Once the document is open, click the Activate action (this is also available during edit mode).

Result:**C.B.M.S**

Contract Business Management System

RAQS Home | Cont

Contracts | Contractors | Non-Qualified TRFs

Expand All

Collapse All

Create NOTRF

Create CTF

Find

Contracts By Number

Lines per page: 500

1990.71

1991.38

1993.09

1993.233

1993.97

1998.20

2000.0012

2000.4313

2001.8900

2003.0002

2003.0500

2003.0501

Contract Tender Form

Contract: 2003-0501 Tender Opening: 29-May-2003 at 12:00:00 PM

The document is activated and saved (the screen may flash when Activation is done in read mode) and the Contracts By Number view is re-opened. The document now has the Active icon beside it.

Awarding a Contract Tender Form

Once the bids for a contract have been opened and the contract has been updated with the bid amounts (see Updating Tender Totals), the contract can be awarded to a contractor. This places the contract into the Awarded in the Last 30 Days category of the Contract Bulletin. This also allows external users to view awardee information through the RAQS public site and the CBMS secure site. If the contract is awarded to a Qualified Contractor, this also creates a Performance Rating document used by Regional Construction users and the Qualifications Office to rate the contractor's performance on the contract.

Once a contract is awarded, award information can also be removed using the Award Contract action. Also, the contract can be specified as a Non-Award by using the Award Contract action.

Conditions Required

1. The contract must have a status of Active.
2. The contract must have at least one approved TRF or NQTRF.
3. The Bidding Complete field must be set to Yes.
4. The Tender Owner must be MTO Regional.
5. The awardee's Tender Totals must already be updated.
6. The contract must be from the same region as the current Regional Tender User.

Step One:

C.B.M.S

Contract Business Management System

Contracts | Contractors | Non-Qualified TRFs

Contract Tender

Status: Active

Status Last Updated By:

-  Cancel
-  Save & Exit
-  Inactivate
-  Update Bids
-  Award Contract

Open the desired contract in read or edit mode and click the Award Contract action.

► Pre-Award Section

► Plan Takers Section

Step Two:

Select a bidder to award to, or choose Remove or Non Award:

50-10000-00 (Joint) [Wendys]

OK Cancel

A prompt appears with a list of the choices. The choices include:

- The list of bidders from the Bid Information section
- "Remove Award" (this choice only appears if the Awarded To Firm Name field has a value)
- "Non-Award"

Select a company and click OK to award the contract to that company.

Note: Selecting "Remove Award" clears out the values of the Awarded To subsection. Selecting "Non-Award" specifies that the contract will not be awarded to anyone.

Step Three:

Microsoft Internet Explorer

Award Information fields have been updated. Click Save & Exit to save the updates.

OK

A prompt appears to indicate that the award fields have been updated and remind the user that the document must still be saved to keep the changes. Click OK.

Step Four:

C.B.M.S.
Contract Business Management System

RAQS Home | Contact Us | Logout
MTO Regional User (John Smith)

Cancel
Save & Exit
Inactivate
Update Bids
Award Contract

Awarded To

Firm	Total Adjusted Tender	Total Tender
50-10000-00 (Joint) [Wendys]	\$55,000.00	\$60,000.00

Dates

Award Date: 05/05/2003

The Firm, Total Adjusted Tender, and Total Tender fields of the Awarded To subsection are now computed to the chosen contractor. Enter the award date (this is required before saving since an awardee was chosen).

Step Five:**C.B.M.S**

Contract Business Management System

RAQS Home | Contact Us | Logout

MTO Regional User
(John Smith)

Contracts | Contractors | Non-Qualified TRFs

-  Cancel
-  **Save & Exit**
-  Inactivate
-  Update Bids
-  Award Contract

Contract Tender Form

Contract active

Click the Save & Exit action to finish the award process.

► Pre-Award Section

► Plan Takers Section

Result:

The contract is now awarded. If the contract is awarded to a Qualified Contractor, one or more performance rating documents will be created by the CBMS system when the contract is saved. Regional Construction users from the same region as the contract will be able to read and edit these documents. Regional Tender users are unable to read these documents.

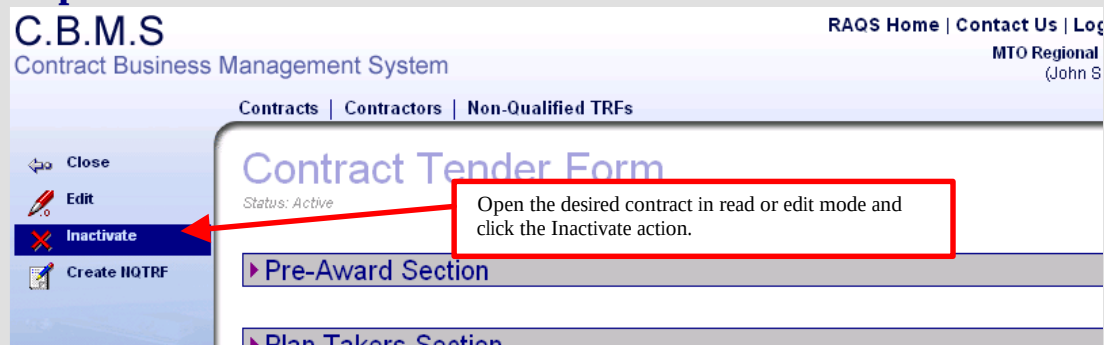
Inactivating a Contract Tender Form

Inactivating a contract sets the status of the contract to Cancel. This means that external users will no longer be able to view the contract through the RAQS public site or the CBMS secure site, contractors will no longer be able to create TRF or NQTRF documents for the contract, and the contract will be no longer be editable.

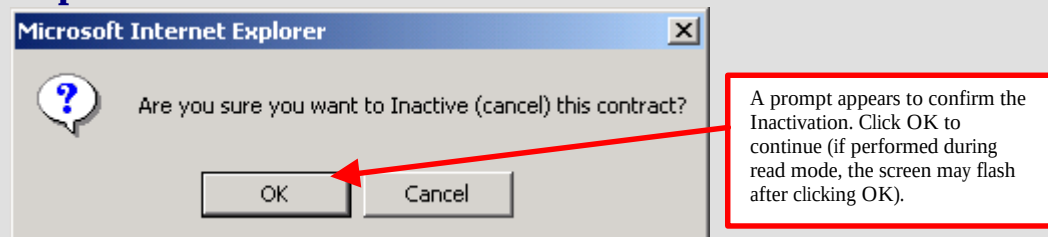
Conditions Required

1. The contract must have a status of Active.
2. The Tender Owner must be MTO Regional.
3. The contract must be from the same region as the current Regional Tender user.
4. The Tender Opening Date must not have passed.

Step One:



Step Two:



Result:**C.B.M.S**

Contract Business Management System

[RAQS Home](#) | [Contact Us](#) | [L](#)MTO Region
(John)[Contracts](#) | [Contractors](#) | [Non-Qualified TRFs](#)

-  [Expand All](#)
-  [Collapse All](#)
-  [Create NOTRF](#)
-  [Create CTF](#)
-  [Find](#)

Contracts By Number

Lines per page: 300

- ▶ 1990-71
- ▶ 1991-38
- ▶ 1993-09
- ▶ 1993-233
- ▶ 1993-97
- ▶ 1998-20
- ▶ 2000-0012
- ▶ 2000-1313
- ▶ 2001-8900
- ▶ 2003-0002
- ▶ 2003-0500
- ▼ 2003-0501

▼ Contract Tender Form

 Contract: 2003-0501 Tender Opening: 29-May-2003 at 12:00:00 PM

The last view is re-opened and the contract now has a Cancel icon next to it.

Deleting a Contract Tender Form

Draft contracts can be deleted if desired. This removes them permanently from CBMS. Deleted contracts are not recoverable, so deletion of contracts should be done carefully.

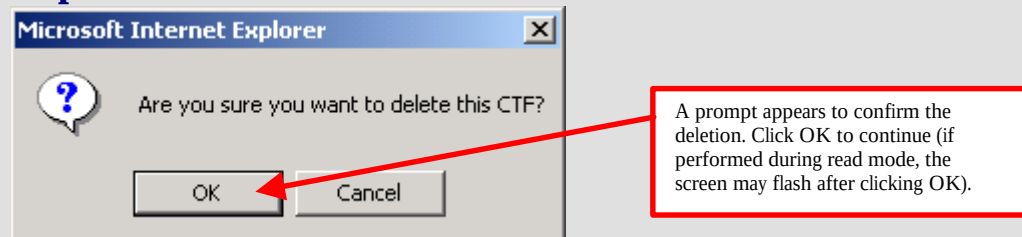
Conditions Required

1. The contract must be in Draft status.
2. The Tender Owner must be MTO Regional.
3. The contract must be from the same region as the current Regional Tender user.

Step One:



Step Two:



Result:

The contract is deleted from the database.

Updating Tender Totals

Each company with an approved TRF or NQTRF should have their bids entered into the contract after tender opening occurs. This action allows the Total Tender and Total Adjusted Tender values to be entered for each company in the Bid Information Section.

Conditions Required

1. The contract must have at least one approved TRF or NQTRF.
2. The contract must be from the same region as the current Regional Tender user.
3. The Tender Owner must be MTO Regional.
4. The contract must have a status of Active.

Step One:

C.B.M.S

Contract Business Management System

Contracts | Contractors | Non-Qualified TRFs

Contract Tender Form

Status: Awarded

Status Last Updated By: John Smith

Cancel

Save & Exit

Inactivate

Update Bids

Award Contract

Pre-Award

Plan Takers Section

Open the desired contract in read or edit mode and click the Update Bids action (if performed during read mode, the screen may flash after clicking Update Bids).

Step Two:

Please select the firm whose tender totals you wish to update:

50-10000-00 (Joint) [Wendys]

OK

Cancel

A prompt appears with a list of choices. The list is populated with the companies in the Bid Information section. Select the company to update and click OK.

Step Three:

Explorer User Prompt

Script Prompt:

Please enter the Total Tender Amount.

\$50,000.00

A prompt appears asking for the Total Tender amount. The prompt is populated with the current Total Tender amount of the selected company. Enter the desired amount and click OK.

OK

Cancel

Step Four:

Explorer User Prompt

Script Prompt:
Please enter the Total Adjusted Tender Amount.

OK
Cancel

A prompt appears asking for the Total Adjusted Tender amount. The prompt is populated with the current Total Adjusted Tender amount of the selected company. Enter the desired amount and click OK.

Result:

C.B.M.S
Contract Business Management System

RAQS Home | Contact Us | Logo
MTO Regional Us
(John Smi)

Contracts | Contractors | Non-Qualified TRFs

Contract Tender Form
Status: Awarded Status Last Updated By: John Smith

Pre-Award Section
Plan Takers Section
Bid Information Section

Click Save & Exit to keep the updates.

The Total Adjusted Tender and Total Tender amounts for the chosen company have been updated.

Company	Total Adjusted Tender	Total Tender
60-10000-00 (Joint) [Wendys]	\$55,000.00	\$50,000.00
70-10001-00 (Simple) [The Keg]	\$70,000.00	\$60,000.00

Bidding Complete: ☐ Yes ☒ No

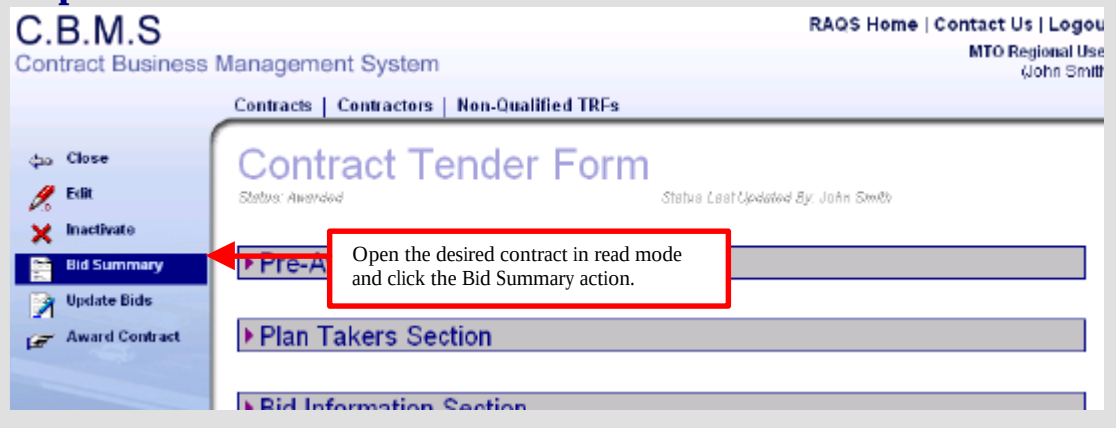
Creating a Bid Summary

A bid summary report can be created for an active contract once it has at least one approved TRF or NQTRF. This report lists details about each qualified bidder.

Conditions Required

1. The contract must be in read mode.
2. The contract must have a status of Active.
3. The Tender Owner must be MTO Regional.
4. The contract must be from the same region as the current Regional Tender user.
5. The contract must have at least one approved TRF or NQTRF.

Step One:



Result:

A Bid Summary is created for the selected contract. The Bid Summary displays information about the contract, as well as a table of information about each bidder. This summary can be printed using Internet Explorer by right-clicking on the document and selecting Print (page orientation can be set to Landscape in the print dialog if necessary).

C.B.M.S
 Contract Business Management System

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 MTO Regional User
 (John Smith)

[Contracts](#) | [Contractors](#) | [Non-Qualified TRFs](#)

[Back](#)

Bids Received Summary

Contract Information							
Contract Number	2003-0500			Date Created:	05/06/2003		
Tender Opening Date:	05/29/2003			Tender Owner:	MTO Regional		
Tender Opening Time:	12:00:00 PM			Contract Location:	QEW		
Total # of Bidders	2			Contract Name:	Jason Thomas		
				Contact Fax:			

Contract Description							
Grading and Paving							

ID#	Firm	Tender	Adjusted Tender	Bid Type	Contact Name(s)	Phone	Fax
1	(Lead) Wendys (80%) 50-10000-00 [Wendys] (40%) 50-10000-00 [Burger King]	\$50000.00	\$55000.00	Joint Bid By Unrelated Companies	Tim Horton	(111) 111-1111	(111) 111-1111
2	The Keg	\$60000.00	\$70000.00	Simple Bid	Jason Thomas	(333) 333-3335 (333) 333-3335	(333) 333-3333 (333) 333-3333

Non-Qualified Contractor Registration Form (NQ CRF)

The following Chapter describes the Non-Qualified Contractor Registration Form and all associated actions that can be performed.

The Non-Qualified Contractor Registration Form is used to view Qualified and Non-Qualified Contractor Registration documents. It is also used to create and update NQCRF documents on behalf of Non-Qualified Contractors (by proxy). Regional Tender users can also "Not Approve" and "Approve" Non-Qualified Contractor Registration documents (unless they have already been Approved or Not Approved by the MTO Qualifications Office).

I C O N K E Y	
	Approved NQCRF
	Not Approved NQCRF
	Submitted NQCRF

Without an approved NQCRF, a Non-Qualified Contractor is considered Non-Respondent. This allows them to login to CBMS via the Internet and: view contracts, purchase documents for MTO Capital contracts, and create and update their own NQCRF.

Once a Non-Qualified Contractor has an approved NQCRF, they are considered a Respondent Non-Qualified Contractor. This allows them to login to CBMS via the Internet and: perform the same things as a Non-Respondent Non-Qualified Contractor, create Non-Qualified Tender Registration documents to pre-qualify to bid on contracts, use electronic bidding for MTO Capital contracts, and receive correspondence from the ministry through CBMS.

Creating a Non-Qualified CRF

Conditions Required

1. The Non-Qualified Contractor must have a CBMS User ID/Password (these are given out through the RAQS Public Site Administration).
2. The Non-Qualified Contractor must not already have an NQCRF document.

Step One:

C.B.M.S.
Contract Business Management System

Contracts | Contractors | Non-Qualified TRFs

Create NQCRF
Find

Contractors By Company Name

Lines per page: 3

Company Name	Assigned ID
Burger King	50-10020-00

Contact Info
10 Burger Ave
Burger, Ontario, Canada
B1B 1B1
Phone: (222) 222-2222
Fax: (222) 222-2222
Web: burger@king.com
10 Dairylane
Dairyville, Ontario, Canada

Navigate to either the Contractors By Company Name or Contractors By Assigned ID view and click the Create NQCRF action.

Step Two:

Please choose a company

Jason Inc

OK Cancel

A prompt appears with a list of contractors to choose from. The list includes all non-qualified companies that have received a username and password through the RAQS public site AND have no existing NQCRF document. Select the desired company and click OK to continue.

Step Three – Company Information:

Jurisdiction: This field can describe the jurisdiction of the company. It defaults to the province that the company used to register in RAQS (through the RAQS public site).

Corporate Number: This field can hold the corporate number of the company.

Company Tombstone Information Fields: These address and contact fields include Corporate Name, Suite Number, Address, City, Email, Prov/State, Phone, Country, Fax, Postal/Zip, and Web Site. Except for Web Site, these fields default to the values that the company used to register in RAQS (through the RAQS public site). Address, City, Prov/State, Country, Postal/Zip, and Phone are all required to save a new document.

C.B.M.S. Contract Business

Help | RAQS Home | Contact Us | Logout
MTD Regional User (John Smith)

Cancel Save & Edit Approve

Note: the Cancel action can be used at any time while creating or editing a document. It closes the document without saving and re-opens the last view.

Edit the Company Information section as desired and make sure the required fields are filled in.

Company Information

Jurisdiction: Ontario Corporate Number:

Corporate Name: Jason Inc.

Suite Number:

Address: 12 Videt Cr

City: St Catharines Email: jason@newindconsulting.ca

Prov/State: Ontario Phone: (905) 000-9090

Country: Canada Fax: (905) 000-9090

Postal/Zip: K3K 3K3 Web Site:

Related Companies:

Step Four – Contact Information:

This section contains tombstone information for the main contact person for this company. The Given Name and Surname fields are required to save a new document and default to the name that the company used to register in RAQS (through the RAQS public site).

C.B.M.S. Contract Business Management System

Help | RAQS Home | Contact Us | Logout
Regional User (John Smith)

Contracts | Contractors | Non-Qualified TRFs

Cancel Save & Edit Approve

Click here to copy company information

Contact Information

Given Name: Jason Position/Title:

Surname: Thomas

Suite Number:

Street Address:

Phone: Ontario Ext:

Canada Fax:

Email:

Click here to copy the field values from the Company Information section into this section.

Edit the Contact Information section as desired and make sure the required fields are filled in.

Step Five:

Alternate Contact Information: This section contains tombstone information for the alternate contact person for this company.

Comments: This field can contain any extra comments that should be added to this document. The company will be able to read this field. The Qualifications Office will be able to read and edit this field.

C.B.M.S.
Contract Business Management System

Help | RAGS Home | Contact Us | Logout
MTQ Regional User (John Smith)

Contracts | Contractors | Non-Qualified TRFs

Cancel
Save & Exit
Approve

Country: Canada Postal/Zip: Email:

Alternate Contact Information Click here to copy company information

Given Name: Position/Title:

Surname:

Suite Number:

Phone: Ext: Fax: Postal/Zip: Email:

Comments

Enter any extra comments here.

Click here to copy the field values from the Company Information section into this section.

Edit the Alternate Contact Information fields as desired.

Step Six:

C.B.M.S.

Contract Business Management System

Contracts | Contractors | Non-Qualified TRFs

Cancel
Save & Exit
Approve

Registration Form

Status: Submitted
✓ - Required Fields

Company Information

Jurisdiction: Ontario Corporate Number:

Corporate Name: Jason Inc

Suite Number:

Address: ✓ 12 Videl Cr

City: ✓ St Catharines Email:

Prov/State: ✓ Ontario Phone: ✓

Click the Save & Exit action to finish the new registration document.

Result:

C.B.M.S.
Contract Business Management System

Help | RAGS Home | Contact Us | Logout
MTO Regional User
(John Smith)

Contracts | Contractors | Non-Qualified TRFs

Create HQCP
Find

Dairy Queen	50-10060-00	Dairyville, Ontario, Canada D1D 1D1 Phone: (111) 111-1111
Graham's Consulting	70-10002-00	Phone: (555) 555-5555 Fax: (505) 684-4540 Web:
Jason Inc.	70-10003-00	12 Videt Cr St Catharines, Ontario, Canada K3K 3K3 Phone: (509) 090-9090 Fax: (509) 090-9090 Web: jason jason, Ontario, Canada J3J 3J3 Phone: (333) 333-3331 Fax: (333) 333-3333 Web:
Jason NOC Test 2	70-10000-00	10 McDonald Lane McDonaldville, Ontario, Canada M1M 1M1 Phone: (111) 111-1111 Fax: (111) 111-1111 Web: big@mac.com
McDonalds	50-10040-00	

The last view is re-opened and the new document is visible with a Submitted icon.

Editing a Non-Qualified CRF

Conditions Required

NQCRF documents are always editable.

Step One:

C.B.M.S.
Contract Business Management System

Help | RAGS Home | Contact Us | Logout
MTQ Regional User (John Smith)

Contracts | Contractors | Non-Qualified TRFs

Create NQCRF
Find

Dairy Queen 50-10060-00

Graham's Consulting 70-10002-00 LZW 1C2
Phone: (556) 555-5555
Fax: (505) 694-4640
Web:

Jason Inc. 70-10003-00 12 Videt Cr
St Catharines, Ontario, Canada
K3K 3K3
Phone: (509) 090-9090
Fax: (509) 090-9090
Web: jason
jason, Ontario, Canada
J3J 3J3
Phone: (333) 333-3331
Fax: (333) 333-3333
Web: 10 McDonald Lane
McDonaldville, Ontario, Canada
M1M 1M1
Phone: (111) 111-1111
Fax: (111) 111-1111
Web: big@mac.com

Jason NQC Test 2 70-10003-00

McDonalds 50-10040-00

Open the Contractors By Company Name or Contractors By Assigned ID view, locate the desired document, and click the document to open it.

Step Two:

C.B.M.S.
Contract Business Management System

Help | RAGS Home | Contact Us | Logout
MTQ Regional User (John Smith)

Contracts

Close
Edit
Approve
Not Approve

Registration Form

Status: Submitted

Company Information

Jurisdiction:	Ontario	Corporate Number:	
Corporate Name:	Jason Inc.		
Suite Number:			
Address:	12 Videt Cr		
City:	St Catharines	Email:	jason@rewindconsulting.com
Prov/State:	Ontario	Phone:	(509) 090-9090
Country:	Canada	Fax:	(509) 090-9090
Postal/Zip:	K3K 3K3	Web Site:	
Related Companies:			

Contact Information

Given Name:	Jason	Position/Title:	
Surname:	Thomas		
Suite Number:			
Street Address:	12 Videt Cr		
City:	St Catharines	Phone:	(509) 090-9090
Prov/State:	Ontario	Ext:	
Country:	Canada	Fax:	(509) 090-9090
Postal/Zip:	K3K 3K3	Email:	jason@rewindconsulting.com

With the document now open in read mode, click the Edit action to open it in edit mode.

Step Three:

Jurisdiction: This field can contain the jurisdiction that the company works in. This field is always editable and always optional.

Corporate Number: This field can contain the company's corporate number. This field is always editable and always optional.

Corporate Name: This field contains the company's corporate name. This field is computed to the name that the company used to register in RAQS (through the RAQS public site). This field is never editable.

Company Tombstone Information Fields: This includes the Suite Number, Address, City, Email, Prov/State, Phone, Country, Fax, Postal/Zip, and Web Site fields. These fields are always editable. The Address, City, Prov/State, Phone, and Postal/Zip fields are always required. All other fields are always optional

Related Companies: This field will be blank for Non-Qualified Contractor registrations. When reading Qualified Contractor registrations, this field can contain a list of companies within CBMS that are related to the current company.

C.B.M.S.
Contract Business Management System

Help | RAQS Home | Contact Us | Logout
MTO Regional User
(John Smith)

Contracts | Contractors | Non-Qualified TRFs

Registration Form

Status: Submitted
- Required Fields

Company Information

Jurisdiction:	Ontario	Corporate Number:	
Corporate Name:	Jason Inc		
Suite Number:			
Address:	12 Videt Cr		
City:	St Catharines	Email:	jason@newindconsulting.ca
Prov/State:	Ontario	Phone:	(905) 090-9090
Country:	Canada	Fax:	(905) 090-9090
Postal/Zip:	K3K 3K3	Web Site:	
Related Companies:			

Edit the Company Information section as desired.

Step Four:

Contact Information Section: This section contains tombstone information for the primary contact person for this company. The section is always editable. The Given Name and Surname fields are always required. All other fields are always optional.

C.B.M.S.
Contract Business Management System

Help | RAQS Home | Contact Us | Logout
MTO Regional User
(John Smith)

Contracts | Contractors | Non-Qualified TRFs

Contact Information Click here to copy company information

Given Name:	Jason	
Surname:	Thomas	
Suite Number:		
Street Address:	12 Videt Cr	
City:	St Catharines	Phone:
Prov/State:	Ontario	Ext:
Country:	Canada	Fax:
Postal/Zip:	K3K 3K3	Email:

Edit the Contact Information section as desired.

Step Five:

Alternate Contact Information: This section contains tombstone information for the alternate contact person for this company. The section is always editable and always optional.

Comments: This field can contain comments that should be read by the company and/or the Qualifications Office. This field is always editable and optional.

C.B.M.S.
Contract Business Management System

Help | RAQS Home | Contact Us | Logout
MTO Regional User
(John Smith)

Contracts | Contractors | Non-Qualified TRFs

Country: Canada Fax: (909) 090-9090
Postal/Zip: K3K 3K3 Email: jason@newindconsulting.c

Alternate Contact Information Click here to copy company information

Given Name: Position/Title:
Surname:
Suite Number:
Street Address: 12 Midland Cr
City: St Catharines Phone: (909) 090-9090
Prov/State: Ontario Ext:
Country: Canada Fax: (909) 090-9090
Postal/Zip: K3K 3K3 Email: jason@newindconsulting.c

Comments

Step Six:

C.B.M.S.
Contract Business Management System

Help | RAQS Home

Contracts | Contractors | Non-Qualified TRFs

Country: Canada Fax: (909) 090-9090
Postal/Zip: K3K 3K3 Email: jason@newindconsulting.c

Alternate Contact Information Click here to copy company information

Given Name: Position/Title:
Surname:
Suite Number:

Cancel
Save & Exit
Approve
Not Approve

Result:

The document is updated with the changes made.

Approving a Non-Qualified CRF

Regional Tender users can approve NQCRF documents. Once a Non-Qualified Contractor has an approved NQCRF, they become “Respondent”. This means they can register online to bid on contracts (NQTRF), bid on MTO Capital contracts online, and receive correspondence from Ministry through CBMS. Once an NQCRF document is “Not Approved” by the Qualifications Office, Regional Tender users are no longer able to approve it.

Conditions Required

1. The document must have a status of Submitted or Not Approved.
2. The document must not have been Not Approved by the Qualifications Office.

Step One:

C.B.M.S
Contract Business Management System

Help | RAQS Home | Contact Us | Logout
MTO Regional User
(John Smith)

Contracts | Contractors | Non-Qualified TRFs

Create NQCRF
Find

Contractors By Company Name

Items per page: 200

Company Name	Assigned ID	
Burger King	50-10000-00	
Dairy Queen	50-10000-00	10 Dairylane Dairyville, Ontario, Canada D1D 1D1 Phone: (111) 111-1111 Fax: (111) 111-1111 Web: dairy@queen.com 12 Vidal Cr St Catharines, Ontario, Canada L2W 1C2 Phone: (555) 555-5555 Fax: (505) 684-4640 Web:
Graham's Consulting	70-10002-00	
Jason Inc	70-10003-00	12 Vidal Cr St Catharines, Ontario, Canada K2K 3K3 Phone: (509) 090-0090 Fax: (509) 090-0090 Web:

Navigate to the Contractors By Company Name or Contractors By Assigned ID view, locate the desired document, and click to open it.

Step Two:**C.B.M.S**

Contract Business Management System

Help | RAQS Home | Contact Us | Logout

MTO Regional User
(John Smith)

Contracts | Contractors | Non-Qualified TRFs

Close

Edit

Approve

Not Approve

Registration Form

(Status: Submitted)

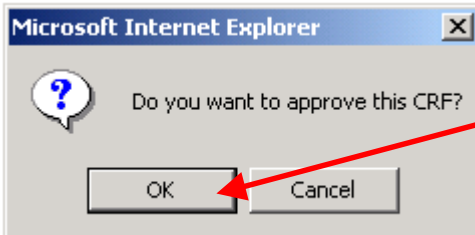
Company Information

Jurisdiction:	Ontario	Corporate Number:	
Corporate Name:	Jason Inc.		
Suite Number:			
Address:	12 Videll Cr.		
City:	St Catharines		
Prov/State:	Ontario		
Country:	Canada		
Postal/Zip:	L3K 9K3		
Related Companies:			

With the document open in read or edit mode, click the Approve action (when used in read mode, the screen may flash).

Contact Information

Given Name:	Jason	Position/Title:	
Surname:	Thomas		
Suite Number:			
Street Address:	12 Videll Cr.		
City:	St Catharines	Phone:	(905) 660-8090
Prov/State:	Ontario	Ext:	
Country:	Canada	Fax:	(905) 660-8090
Postal/Zip:	L3K 9K3	Email:	jason@rewindconsulting.com

Step Three:

A prompt appears to confirm the approval. Click OK to continue.

Result:

C.B.M.S
Contract Business Management System

Help | RAQS Home | Contact Us | Logout
MTO Regional User
(John Smith)

Contracts | Contractors | Non-Qualified TRFs

Create HQCRF
Find

Contractors By Company Name

Lines per page: 300

Company Name	Assigned ID	Contact Info
Burger King	50-10000-00	10 Burger Ave Burger, Ontario, Canada
Dairy Queen	50-10000-00	Dairyville, Ontario, Canada D1D 1D1 Phone: (111) 111-1111 Fax: (111) 111-1111 Web: dairy@queen.com
Graham's Consulting	70-10002-00	12 Vidal Cr St Catharines, Ontario, Canada L2W 1C2 Phone: (555) 555-5555 Fax: (505) 654-4640 Web:
Jason Inc	70-10003-00	12 Vidal Cr St Catharines, Ontario, Canada H3K 3K3 Phone: (503) 030-0030 Fax: (503) 030-0030 Web:

The last view is re-opened and the NQCRF document has the Approved icon beside it.

Not Approving a Non-Qualified CRF

Regional Tender users can “Not Approve” NQCRF documents. If a Non-Qualified Contractor does not have an approved NQCRF, they are “Non-Respondent”. This means they cannot register online to bid on contracts (NQTRF), bid on MTO Capital contracts online, or receive correspondence from Ministry through CBMS. They are only able to edit their NQCRF document, view contracts, and purchase documents online for MTO Capital contracts. Once an NQCRF document is “Approved” by the Qualifications Office, Regional Tender users are no longer able to “Not Approve” it.

Conditions Required

1. The document must have a status of Approved or Submitted.
2. The document must not have been “Approved” by the Qualifications Office.

Step One:

The screenshot shows the C.B.M.S. interface with the following elements:

- Header:** C.B.M.S. Contract Business Management System. Navigation links: Help | RAQS Home | Contact Us | Logout. User: MTO Regional User (John Smith).
- Menu:** Contracts | Contractors | Non-Qualified TRFs.
- Left Sidebar:** Create NQCRF, Find.
- Main Content:** Contractors By Company Name. A table with columns 'Company Name' and 'Assigned ID'. A dropdown menu shows 'Lines per page: 100'.
- Table Data:**

Company Name	Assigned ID
Burger King	50-10020-00
Dairy Queen	50-10060-00
Graham's Consulting	70-10003-00
Jason Inc	70-10003-00
- Details Panel:** To the right of the table, contact information for the selected contractor (Jason Inc) is displayed, including Fax, Web, and address.
- Annotation:** A red arrow points from a text box to the 'Jason Inc' entry in the table.

Text Box: Navigate to the Contractors By Company Name or Contractors By Assigned ID view, locate the desired document, and click to open it.

Step Two:**C.B.M.S**

Contract Business Management System

Help | RAQS Home | Contact Us | Logout

MTO Regional User
(John Smith)

Contracts | Contractors | Non-Qualified TRFs

Close

Edit

Not Approve

Registration Form

Status: Approved

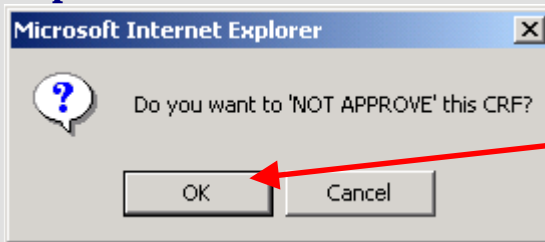
Company Information

Jurisdiction:	Ontario
Corporate Name:	Jason Inc.
Suite Number:	
Address:	12 Videt Cr.
City:	St Catharines
Prov/State:	Ontario
Country:	Canada
Postal/Zip:	K3K 3K3
Related Companies:	
Web Site:	

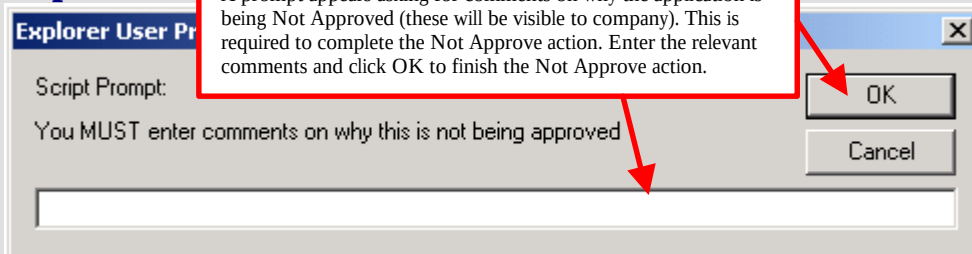
With the document open in read or edit mode, click the Not Approve action (when used in read mode, the screen may flash).

Contact Information

Given Name:	Jason	Position/Title:	
Surname:	Thomas		
Suite Number:			
Street Address:	12 Videt Cr.		
City:	St Catharines	Phone:	(905) 060-9090
Prov/State:	Ontario	Ext:	
Country:	Canada	Fax:	(905) 060-9090
Postal/Zip:	K3K 3K3	Email:	jason@newindconsulting.com

Step Three:

A prompt appears to confirm the action. Click OK to continue.

Step Four:

A prompt appears asking for comments on why the application is being Not Approved (these will be visible to company). This is required to complete the Not Approve action. Enter the relevant comments and click OK to finish the Not Approve action.

Result:

C.B.M.S.
Contract Business Management System

Help | RAQS Home | Contact Us | Logout
MTO Regional User
(John Smith)

Contracts | Contractors | Non-Qualified TRFs

Create IIGCRF
Find

Contractors By Company Name

Lines per page: 200

Company Name	Assigned ID	Contact Info
Burger King	50	10 Burger Ave Brimmer, Ontario, Canada
Dairy Queen	50-10060-00	10 Dairy Lane Dairyville, Ontario, Canada D1D 1D1 Phone: (111) 111-1111 Fax: (111) 111-1111 Web: dairy@queen.com
Graham's Consulting	70-10062-00	12 Videt Cr St Catharines, Ontario, Canada L2W 1C2 Phone: (555) 555-5555 Fax: (505) 894-4640 Web:
Jason Inc	70-10063-00	12 Videt Cr St Catharines, Ontario, Canada K3K 3K3 Phone: (509) 090-0090 Fax: (509) 090-0090 Web:

The last view is re-opened and the document now has the Not Approved icon.

Non-Qualified Tender Registration Forms

The following Chapter describes the Non-Qualified Tender Registration Form and the associated actions.

The Non-Qualified Contractor Registration Form is used to view Non-Qualified Tender Registration documents. It is also used to create NQTRF documents on behalf of Non-Qualified Contractors (by proxy) for MTO Regional contracts.

I C O N K E Y	
	Approved NQTRF
	Not Approved NQTRF
	Submitted NQTRF

Once an NQTRF document is created for an MTO Regional contract, it is automatically approved. Only one approved NQTRF document can exist per contractor per contract.

Creating a Non-Qualified TRF

Conditions Required

There are no conditions required to create an NQTRF document.

Step One:

The screenshot shows the C.B.M.S. (Contract Business Management System) web application. The top navigation bar includes links for Help, RAQS Home, Contact Us, and Logout. The user is logged in as MTO Regional User (John Smith). The main menu on the left has options for Expand All, Collapse All, Create NQTRF (highlighted with a red arrow), and Find. The main content area is titled 'NQTRF By Company Name' and displays a table with columns for Contract No., Company Name, and Contract Value. The table lists two entries: 'Graham's Consulting - 70-10002-00' and 'The Keg - 70-10001-00'. A red box highlights the 'Create NQTRF' button in the left menu, and a red arrow points from it to a text box.

Navigate to any view under the “Contracts” or “Non-Qualified TRFs” heading and click the Create NQTRF action.

Step Two:

The screenshot shows a dialog box titled 'Please choose a company:'. It contains a dropdown menu with 'The Keg' selected. Below the dropdown are 'OK' and 'Cancel' buttons. A red arrow points from a text box to the 'OK' button.

A prompt appears asking for the company that the NQTRF document is being created on behalf of. The list of choices includes all Respondent Non-Qualified Contractors. Select the desired company and click OK.

Step Three:

Tender: This is the contract number and tender owner of the contract that the NQTRF is being created for. This field is required. The list of choices includes contracts where:

- Bonding Available for Non-Qualified Contractors is set to Yes
- Status is Active
- The Tender Advertise Date has passed
- The TRF Submission Open date has passed
- The Tender Open Date and Time has not passed
- The contractor does not already have an approved NQTRF document created for it
- The Tender Owner is MTO Regional
- The Region is the same as the current Regional Tender User

Tender Opening Date: This automatically computes to the Tender Opening Date of the currently selected contract. This field is not editable.

TRF Submission Open Date: This automatically computes to the TRF Submission Open Date of the currently selected contract. This field is not editable.

TRF Submission Close Date: This automatically computes to the TRF Submission Close Date of the currently selected contract. This field is not editable.

C.B.M.S.
Contract Business Management System

Help | RAQS Home | Contact Us | Logout
MTO Regional User
(John Smith)

Contracts | Contractors | Non-Qualified TRFs

Tender Registration Form

Status: New
- Required Fields

Contract Information	
Tender:	MTO Regional (2000-1313)
Tender Opening Date:	05/13/2003
TRF Submission Open Date:	04/15/2003
TRF Submission Closing Date:	05/08/2003

Step Four – Company Information:

Corporate Name: This is the corporate name of the company. This is computed to the value from the contractor's NQCRF document.

Corporate Number: This field can hold the corporate number of the company. This is defaulted to the value from the contractor's NQCRF document.

Company Tombstone Information Fields: These address and contact fields include Suite Number, Address, City, Prov/State, Phone, Country, Fax, Postal/Zip, and Web Site Address. These fields default to the values from the contractor's NQCRF document. Address, City, Prov/State, Country, Postal/Zip, and Phone are all required.

C.B.M.S.
Contract Business Management System

Help | RAQS Home | Contact Us | Logout
MTO Regional User
(John Smith)

Contracts | Contractors | Non-Qualified TRFs

Company Information

Corporate Name:	Graham's Consulting
Corporate Number:	
Suite Number:	
Address:	12 Yidel Cr
City:	St Catharines
Province/State:	Ontario
Country:	Canada
Postal/Zip Code:	L2W 1G2
Phone:	(555) 555-5555
Fax:	(505) 684-4640
Web Site Address:	

Step Five:

Contact Information: These fields contain tombstone information of the primary contact person for the company with regards to this contract. The Given Name, Surname, Phone, and Fax fields are required. All other fields are optional. If this contractor has any approved NQTRF documents already in the system (for any contract), these fields will default to the values entered on the last approved NQTRF document.

Step Six:

Alternate Contact Information: These fields contain tombstone information of the alternate contact person for the company with regards to this contract. All fields are optional. If this contractor has any approved NQTRF documents already in the system (for any contract), these fields will default to the values entered on the last approved NQTRF document.

Comments: This field can contain any additional comments about this NQTRF document.

Step Seven:**C.B.M.S****Contract Business Management System**

Contracts | Contractors | Non-Qualified TRFs



Cancel



Save & Exit

Country:

Canada

Postal/Zip Code:

Click the Save & Exit action after all fields are completed as desired.

Alternate Contact Information

Given Name:

Result:**C.B.M.S****Contract Business Management System**

Help | RAQS Home | Contact Us

Contracts | Contractors | Non-Qualified TRFs



Expand All



Collapse All



Create NQTRF



Find

NQTRF By Company

Lines per page: 300

Contract No

▼ Graham's Consulting - 70-10002-00

2004-02022

Approved

2000-1313

Approved

▼ The Keg - 70-10001-00

1990-71

Submitted

2004-02022

Approved

2000-1313

Approved

2003-7777

Approved

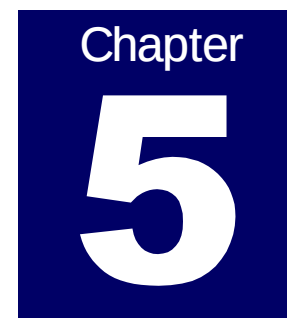
2003-0500

Approved

2003-deug

Approved

The NQTRF document is saved with a status of approved and the last view is re-opened. If the view contains NQTRF documents, the newly created documents will be visible.



Bid Enquiries

The following Chapter describes Bid Enquiries and all associated actions.

Bid Enquiries for MTO Capital contracts are handled within the CBMS application. Contracts Office users can create and respond to them. As part of the response workflow, Contracts Office users can request additional information from designated Regional Tender users in the same region as the contract. These designated users will be notified by email of the request and be able to edit the bid enquiry document to add their input. The list of designated user names and emails for each region is maintained by CBMS administrators.

I C O N K E Y	
	Incomplete
	Complete

Once any bid enquiry is designated as complete by the Contracts Office (regional input or not), it becomes readable by all Regional users (Construction and Tender) from the same region as the contract. Bid enquiry documents are accessible only from the Contracts By Contract Number view. They are categorized under the number of their related contract.

Note: Regional Input can be requested for the same bid enquiry more than once.

Responding to Bid Enquiries

When the Contracts Office requests regional input for a bid enquiry, an email is sent to the designated Regional Tender users from the same region as the contract. The email will look something like this:

```
Subject: Jason Thomas has requested your input and clarification of a MTO Capitol Bid Enquiry

*****
Contract Number:      2003-0505
Tender Owner:        MTO Capital
Region:              Central
District:            Burlington Area Office
Highway:
Location:            sdf
Contract Description: fsdaf
*****

Log in to the R&QS Regional website and complete the Regional Manager
response for this bid enquiry as soon as possible
```

Once this email is received, this step-by-step explains how to respond to the request for regional input.

Conditions Required

1. The user must be a designated Regional Tender user (this group is administered by CBMS administrators).
2. The bid enquiry must currently be awaiting regional input.
3. The bid enquiry's related contract must be from the same region as the current Regional Tender user.

Step One:

C.B.M.S
Contract Business Management System

Help | RAGS Home | Contact Us | Logout
MTO Regional User
(John Smith)

Contracts | Contractors | Non-Qualified TRFs

Contracts By Number

Lines per page: 300

- ▶ 1990-71
- ▶ 1991-38
- ▶ 1993-09
- ▶ 1993-233
- ▶ 1993-97
- ▶ 1998-20
- ▶ 2000-0012
- ▶ 2000-1213
- ▶ 2001-8900
- ▶ 2003-0002
- ▶ 2003-0059
- ▶ 2003-0500
- ▶ 2003-0501
- ▶ 2003-0502
- ▼ 2003-0505
 - ▶ Contract Tender Form
 - ▼ Bid Enquiries
 - ▶ Jason Inc Bid Enquiry Submitted On: at 02:49:18 PM
- ▶ 2003-0625
- ▶ 2003-1111
- ▶ 2003-1112

Navigate to the Contracts By Number view and locate the bid enquiry document under the Bid Enquiries category for the contract specified in the email notification. Click to open.

Step Two:

C.B.M.S
Contract Business Management System

Help | RAGS Home | Contact Us | Logout
MTO Regional User
(John Smith)

Contracts | Contractors | Non-Qualified TRFs

2003-0505 Bid Enquiry

Back Edit

Click on the Edit action to place the document in edit mode.

Contract Details	
Enquiry Originator:	Jason Inc.
Contract Number:	2003-0505
Region:	Central
Highway:	
Description:	fsdaf
Enquiry Date and Time:	12-May-2003 02:49:18 PM
Tender Owner:	MTO Capital
District:	Burlington Area Office
Location:	edf

Enquiry Details	
Type of Enquiry:	General Conditions
Enquiry Text:	Please see my attached questions.

Contracts Office Response Details	
Response Date and Time:	Outstanding
Response Text:	
Comments:	Please clarify on question three of the attached questions.txt

Regional Office Response Details	
Response Originator:	
Regional Office Status:	Outstanding
Response Text:	
Comments:	

Attached Documents	
Enquiry Originator Attachments	

Step Three:

Contract Details Section: The fields in this section are read only and give information about the enquiry and its related contract.

Enquiry Originator: This field contains the name of the company that originated the enquiry. If the Contracts Office created the enquiry, the originator is MTO Contracts Office.

Enquiry Date and Time: This field contains the date and time that the enquiry was created.

Contract Information Fields: This includes the Contract Number, Tender Owner, Region, District, Highway, Location, and Description fields from the related contract.

Contract Details			
Enquiry Originator:	Jason Inc	Enquiry Date and Time:	12-May-2003 02:49:18 PM
Contract Number:	2003-0606	Tender Owner:	MTO Capital
Region:	Central	District:	Burlington Area Office
Highway:		Location:	sd
Description:	fsdaf		

Step Four:

Enquiry Details Section: The fields in this section are read only and give information about the enquiry.

Type of Enquiry: This is the type of enquiry that was submitted.

Enquiry Text: This is the enquiry originator's questions and comments.

Enquiry Details	
Type of Enquiry:	General Conditions
Enquiry Text:	Please see my attached questions.

Step Five:

Contracts Office Response Details Section: This section contains details about the current Contracts Office response to this enquiry. These fields are read only.

Response Date and Time: This is the date and time of the final response to this enquiry. This remains "Outstanding" until the Contracts Office sets this enquiry to Complete.

Response Text: This is the Contracts Office response to this enquiry. This response is visible to either the enquiry originator or all contractors, depending on how the Contracts Office marked the response.

Comments: This field contains comments from the Contracts Office that are visible only to Regional users. This field should contain a brief description of the additional input that the Contracts Office is requesting surrounding this enquiry.

Contracts Office Response Details	
Response Date and Time:	Outstanding
Response Text:	
Comments:	Please clarify on question three of the attached questions.txt

Step Six:

Regional Office Response Details: This section contains the fields needed to respond to the request for additional information. These fields will remain editable until the enquiry is saved with the Regional Office Status field set to Yes.

Response Originator: This is the name of the last Regional Tender user to edit this enquiry. This field computes automatically and is not editable.

Response Date and Time: This is the most recent date and time that this enquiry was saved with the Regional Office Status set to Complete.

Regional Office Status: This is the status of the regional response. This should be set to Complete when the response is ready to be reviewed by the Contracts Office. Once the enquiry is saved with this field set to Complete, the Contracts Office is emailed a notification stating that the enquiry has received regional input and the document is no longer editable by Regional Tender Users.

Response Text: This field should contain the actual regional input for this bid enquiry.

Attachments: Small files can be attached to this bid enquiry by first clicking Browse... to select a file from your computer and then clicking Add Attachment to attach the file. These files are then readable by the Contracts Office only.

Comments: This field can contain any additional comments about this bid enquiry. This field is only readable by Contracts Office users.

Regional Office Response Details	
Response Originator:	Response Date and Time: Outstanding
Regional Office Status:	☒ Outstanding ☐ Complete
Response Text:	
Attach documents for:	Add Attachment Browse...
Comments:	

Add a response, attach a file if desired, add any additional comments if necessary, and set the Regional Office Status to Complete.

Step Seven:

Attached Documents Section: This section contains links to any documents that have been attached to this enquiry. Attachments are separated into those attached by the originator, the Contracts Office, and the Regional Tender users.

Attached Documents	
Enquiry Originator Attachments	questions.txt
Contracts Office Attachments	outstanding.txt
Regional Administrator Attachments	

Attachments can be downloaded and viewed by right clicking on the link and selecting "Save Target As..." or "Open in New Window".

Step Eight:

C.B.M.S
Contract Business Management System

Help | RAQS Home | Contact Us | Logout
MTO Regional User
(John Smith)

Contracts | Contractors | Non-Qualified TRFs

Cancel
Save & Exit

Contracts Office Response Details
Response Date and Time:
Response Text:
Comments:

Once all fields are complete, click Save & Exit to finish.

Regional Office Response Details
Response Originator:
Regional Office Status: ☐ Outstanding ☒ Complete
Response Text: This is my response.
Attach documents for: Add Attachment Browse...
Comments:

Attached Documents
Enquiry Originator Attachments
questions.txt
Contracts Office Attachments
outstanding.txt
Regional Administrator Attachments

Result:

The document is saved. If the Regional Office Status was set to complete, the document is no longer editable by any Regional Tender users and the Contracts Office receives an email notifying them that this enquiry has received regional input.

Contract Attachments

The following Chapter describes how to view/download contract attachments.

Mto Capital contracts can have contract attachments created for them (ex: Plan Book, Tender Document, etc). Contractors can then purchase these attachments through the secure CBMS site.

However, regional users (Construction or Tender) can download these attachments automatically through the Regional interface. Contract Attachments can only be viewed from the Contracts By Number view. They are categorized under the number of their related contract.

ICON KEY

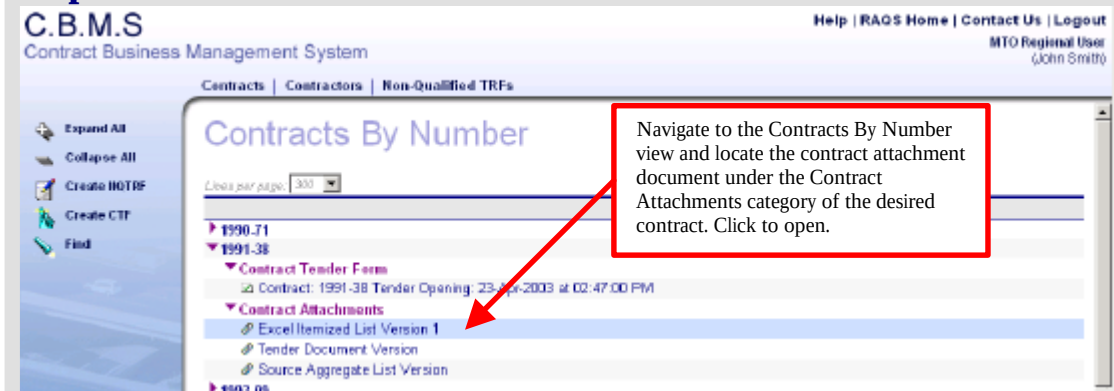
 Contract Attachment

Downloading/Viewing Contract Attachments

Conditions Required

There are no conditions required to perform this action.

Step One:



C.B.M.S.
Contract Business Management System

Help | RAQS Home | Contact Us | Logout
MTO Regional User
(John Smith)

Contracts | Contractors | Non-Qualified TRFs

Contracts By Number

Lines per page: 300

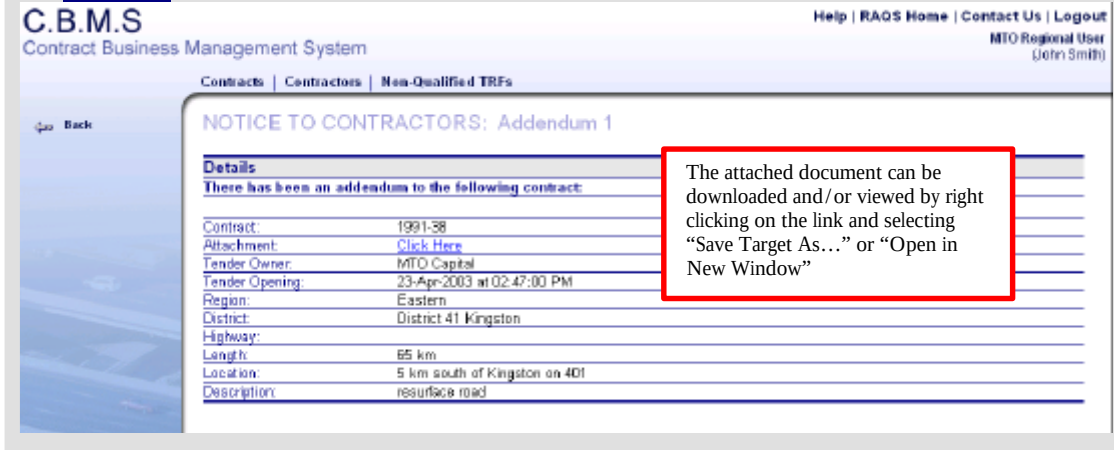
- 1990-71
- 1991-38
 - Contract Tender Form
 - Contract: 1991-38 Tender Opening: 23-Apr-2003 at 02:47:00 PM
 - Contract Attachments**
 - Excel Itemized List Version 1
 - Tender Document Version
 - Source Aggregate List Version
- 1993-05

Navigate to the Contracts By Number view and locate the contract attachment document under the Contract Attachments category of the desired contract. Click to open.

Result:

The contract attachment form contains the following fields from the related contract: Contract Number, Tender Owner, Tender Opening, Region, District, Highway, Length, Location, and Description.

The [Attachment](#) field contains a link to download the attached document.



C.B.M.S.
Contract Business Management System

Help | RAQS Home | Contact Us | Logout
MTO Regional User
(John Smith)

Contracts | Contractors | Non-Qualified TRFs

NOTICE TO CONTRACTORS: Addendum 1

Back

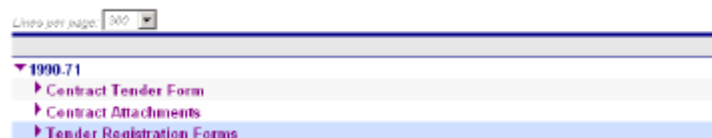
Details	
There has been an addendum to the following contract:	
Contract:	1991-38
Attachment:	Click Here
Tender Owner:	MTO Capital
Tender Opening:	23-Apr-2003 at 02:47:00 PM
Region:	Eastern
District:	District 41 Kingston
Highway:	
Length:	65 km
Location:	5 km south of Kingston on 401
Description:	resurface road

The attached document can be downloaded and/or viewed by right clicking on the link and selecting "Save Target As..." or "Open in New Window"

Contracts Views

The following Chapter describes all of the views contained under the Contracts menu heading.

Contracts By Number



► WHAT DOES THE VIEW CONTAIN?

This view contains the following types of documents:

- All Contracts (CTF)
- All Contract Attachments
- All Non-Qualified Tender Registrations (NQTRF)
- All Qualified Tender Registrations (TRF)
- Complete Bid Enquiries
- Bid Enquiries requiring Regional Input

► WHERE IS THE VIEW LOCATED?

This view is accessed by clicking on Contracts – View By Contract Number:



► HOW IS THE VIEW SORTED?

The view is sorted (ascending order) and categorized by contract number. Within each contract, documents are categorized by type: Contract Tender Form, Contract Attachments, Tender Registration Forms, or Bid Enquiries.

► WHAT ACTIONS ARE AVAILABLE FROM THE VIEW?

The following actions can be performed while this view is open:

- Expand All
- Collapse All
- Create NQTRF
- Create CTF
- Find

View By Tender Opening Date



Description	Tender Deposit Received	Submission/Acceptance Date
Contract: 2003-0500- NonQualified		5-May-2003
NQTRF The Keg		5-May-2003
TRF Wendys		5-May-2003

► WHAT DOES THE VIEW CONTAIN?

This view contains the following types of documents:

- All Contracts (CTF)
- All Non-Qualified Tender Registrations (NQTRF)
- All Qualified Tender Registrations (TRF)

► WHERE IS THE VIEW LOCATED?

This view is accessed by clicking on Contracts – View By Tender Opening Date:



► HOW IS THE VIEW SORTED?

The view is sorted (descending order) and categorized by Tender Opening Date. Within each date, documents are categorized by Contract Number.

► WHAT ACTIONS ARE AVAILABLE FROM THE VIEW?

The following actions can be performed while this view is open:

- Expand All
- Collapse All
- Create NQTRF
- Create CTF
- Find

Contract Bulletin

Clones per page: 100

Contract Number	Document Type	Region	District	Tender Opening Date
▼ Information Posted in Last 7 Calendar Days				
1593-09	MTO Contract	Central	Burlington Area Office	30-May-2003 05:00:00 PM
► Tenders Under Call				
► Open Bids				
► Awarded in Last 30 Days				
► Tender Procedures				
► MTO Info				

► WHAT DOES THE VIEW CONTAIN?

This view contains the following types of documents:

- Active, Advertised Contracts (CTF)
- Contract Attachments of type Addendum
- All Extension of Time/Deferrals
- Approved Contract Bulletin Articles
- All Cancellation Documents

► WHERE IS THE VIEW LOCATED?

This view is accessed by clicking on Contracts – Contract Bulletin:

Contracts	Contractors	Non-Qualified TRFs
View By Contract Number		
View By Tender Opening Date		
Contract Bulletin		
5 Year Contract History		
Contracts By Regional Map		

► HOW IS THE VIEW SORTED?

Documents are categorized into one of the following Contract Bulletin categories: Information Posted in the Last 7 Days, Tenders Under Call, Open Bids, Awarded in Last 30 Days, or Article Type (this could be one or more user specified categories). Within each category, documents are sorted ascending by Contract Number.

► WHAT ACTIONS ARE AVAILABLE FROM THE VIEW?

The following actions can be performed while this view is open:

- Click on any column header to sort by that column (ascending)
- Expand All
- Collapse All
- Create NQTRF
- Create CTF
- Find

5 Year Contract History View

Lines per page: 300

Tender Owner	Contract Number	Tender Opening Date	Status
▼ MT0 Capital			
▶ Central			
▼ Eastern	1991-38	29-Apr-2003 02:47:00 PM	Awarded in Last 30 Days

► WHAT DOES THE VIEW CONTAIN?

This view contains the following types of documents:

- All Contracts (CTF) tendered in the last 5 years

► WHERE IS THE VIEW LOCATED?

This view is accessed by clicking on Contracts – 5 Year Contract History View:

Contracts	Contractors	Non-Qualified TRFs
View By Contract Number		59
View By Tender Opening Date		05
Contract Bulletin		12
5 Year Contract History		22
Contracts By Regional Map		49

► HOW IS THE VIEW SORTED?

Documents are categorized first by Tender Owner, then Region. Within each region, documents are sorted ascending by Contract Number.

► WHAT ACTIONS ARE AVAILABLE FROM THE VIEW?

The following actions can be performed while this view is open:

- Expand All
- Collapse All
- Create NQTRF
- Create CTF
- Find

Contracts By Regional Map



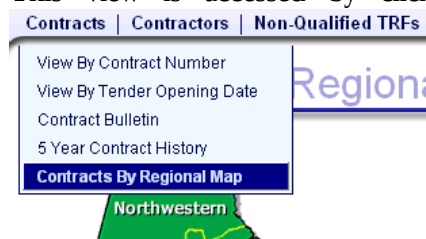
► WHAT DOES THE VIEW CONTAIN?

This view contains the following types of documents:

- Contracts (CTF) currently in the Tenders Under Call Contract Bulletin category from the currently selected Region.

► WHERE IS THE VIEW LOCATED?

This view is accessed by clicking on Contracts – Contracts By Regional Map:



► HOW IS THE VIEW SORTED?

The view is sorted ascending by Tender Opening Date.

► WHAT ACTIONS ARE AVAILABLE FROM THE VIEW?

The following actions can be performed while this view is open:

- Click on any region on the map to view contracts from that region
- Create NQTRF
- Create CTF

Contractors Views

The following Chapter describes all of the views contained under the Contractors menu heading.

View By Company Name

Company Name	Assigned ID	Contact Info
 Burger King	50-10020-00	10 Burger Ave Burger, Ontario, Canada B1B 1B1 Phone: (222) 222-2222 Fax: (222) 222-2222 Web: burger@king.com
 Dairy Queen	50-10050-00	10 Dairy Lane Dairyville, Ontario, Canada D1D 1D1 Phone: (111) 111-1111 Fax: (111) 111-1111 Web: dairy@queen.com

► WHAT DOES THE VIEW CONTAIN?

This view contains the following types of documents:

- All Non-Qualified Contractor Registrations (NQCRF)
- All Qualified Contractor Registrations (CRF) that have expired in the last year or are approved

► WHERE IS THE VIEW LOCATED?

This view is accessed by clicking on Contractors – View By Company Name:



► HOW IS THE VIEW SORTED?

The view is sorted ascending by Company Name.

► WHAT ACTIONS ARE AVAILABLE FROM THE VIEW?

The following actions can be performed while this view is open:

- Create NQCRF
- Find

View By Assigned Id

Lines per page: 30

Assigned ID	Company Name	Contact Info
50-10000-00	Wendy's	10 Wendy Ave. Wendyville, Ontario, Canada M1W 1W1 Phone: (111) 111-1111 Fax: (111) 111-1111 Web: Wendy@Wendy.com
50-10000-00	Burger King	10 Burger Ave. Burger, Ontario, Canada B1B 1B1 Phone: (222) 222-2222 Fax: (222) 222-2222 Web: burger@king.com

► WHAT DOES THE VIEW CONTAIN?

This view contains the following types of documents:

- All Non-Qualified Contractor Registrations (NQCRF)
- All Qualified Contractor Registrations (CRF) that have expired in the last year or are approved

► WHERE IS THE VIEW LOCATED?

This view is accessed by clicking on Contractors – View By Assigned ID:



Lines per page:

► HOW IS THE VIEW SORTED?

The view is sorted ascending by Assigned ID.

► WHAT ACTIONS ARE AVAILABLE FROM THE VIEW?

The following actions can be performed while this view is open:

- Create NQCRF
- Find

Non-Qualified TRFs Views

The following Chapter describes all of the views contained under the Non-Qualified TRFs.

View By Company Name

Links per page: 333

Contract No	Status
▼ Graham's Consulting - 70-30002.00	
2004-02022	Approved
2000-1313	Approved

► WHAT DOES THE VIEW CONTAIN?

This view contains the following types of documents:

- Non-Archived Non-Qualified Tender Registrations (NQTRF) (TRF and NQTRF documents are currently archived two weeks after the related contract's tender opening)

► WHERE IS THE VIEW LOCATED?

This view is accessed by clicking on Non-Qualified TRFs – View By Company Name:



► HOW IS THE VIEW SORTED?

The view is categorized and sorted ascending by Company Name.

► WHAT ACTIONS ARE AVAILABLE FROM THE VIEW?

The following actions can be performed while this view is open:

- Expand All
- Collapse All
- Create NQTRF
- Find

View By Contract Number

Lines per page: 350

Company Name	Status	Submission Date	Tender Owner
▼ 1990.71			
The Keg	Submitted	24-Apr-2008 02:29:35 PM	MTO Capital
► 2000.1313			

► WHAT DOES THE VIEW CONTAIN?

This view contains the following types of documents:

- Non-Archived Non-Qualified Tender Registrations (NQTRF) (TRF and NQTRF documents are currently archived two weeks after the related contract's tender opening)

► WHERE IS THE VIEW LOCATED?

This view is accessed by clicking on Non-Qualified TRFs – View By Contract Number:

Contracts | Contractors | Non-Qualified TRFs

NQTRF By

- View By Company Name
- View By Contract Number**
- View Archived

Lines per page:

► HOW IS THE VIEW SORTED?

The view is categorized and sorted ascending by Contract Number.

► WHAT ACTIONS ARE AVAILABLE FROM THE VIEW?

The following actions can be performed while this view is open:

- Expand All
- Collapse All
- Create NQTRF
- Find

View Archived

Lines per page: 300

Company Name	Status	Submission Date	Tender Owner
▼ 1950-71			
The Reg	Submitted	24-Apr-2003 02:29:36 PM	MTO Capital
▶ 2060-1313			

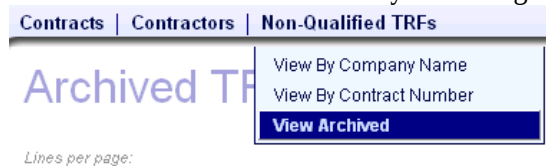
► WHAT DOES THE VIEW CONTAIN?

This view contains the following types of documents:

- Archived Non-Qualified Tender Registrations (NQTRF) (TRF and NQTRF documents are currently archived two weeks after the related contract's tender opening)

► WHERE IS THE VIEW LOCATED?

This view is accessed by clicking on Non-Qualified TRFs – Archived:



► HOW IS THE VIEW SORTED?

The view is categorized and sorted ascending by Contract Number.

► WHAT ACTIONS ARE AVAILABLE FROM THE VIEW?

The following actions can be performed while this view is open:

- Expand All
- Collapse All
- Create NQTRF
- Find

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